



THE COVID AGE OF TV

5 TRENDS THAT WILL CHANGE YOUR MARKETING STRATEGY

INTRODUCTION

If 2020 is anything, it's a year of change. The Golden Age of TV has given way to the COVID Age — pushing the industry to respond to a worldwide crisis and production upheaval like it has never faced. This tsunami is happening while we are still adapting to the dynamic shifts in linear and digital content consumption behaviors that hit their stride in the last decade. These shifts have dramatically accelerated in just the last few months. In between producers and viewers sit the marketers, ready to elevate programming brands and satisfy audiences in this uncertain time. In this new normal, we're all looking for new paths forward.

Disguised in turmoil, this is a real opportunity for TV marketers to embrace the change and trends that will drive the industry for the foreseeable future.

Social media has become even more critically tied to marketing success in such a time of disruption and dislocation. But every TV marketer has what may be an as-yet untapped social asset: a pool of talent brand advocates that are both at the center of the creative process and the forefront of audience interest.

We've identified five trends shaping the industry this year as it grapples with profound shifts in the way content is produced and marketed. We'll look at actions every television marketer can take to adapt to these trends, with examples from leading networks on how to utilize fresh voices to deepen connections with audiences everywhere.

PRODUCTION COSTS RISE WHILE AD REVENUES AND MARKETING BUDGETS FALL

Content production has always been distinguished by large groups of people coming together to work for long hours, in close quarters, and in often finite, dynamic environments. It was inevitable that the current global health crisis would force an early disruption in the process of bringing television content to air.



While many productions have shut down, some never got started and others remain in limbo. For the producers already starting back up this year, they're facing a stark new reality. [Production budgets are rising as much as 30 percent](#) to accommodate critical new health and safety protocols and insurance. These restraints, regulations and guidelines are changing everything from storylines, filming locations and scope of productions to work and filming schedules and decisions on episode numbers, show pickups and renewals. Some of these shifts

may be long overdue, and some may be permanent.

At the same time, network revenues to fund productions are plummeting with [advertisers cutting budgets](#) and with delayed upfronts that normally secure future sponsor commitments. And a lack of fresh programming to retain viewers is accelerating the ongoing audience and revenue migration away from traditional television viewing options and cable subscriptions.

In such an environment, marketing budgets to support shows, networks and new services continue to get trimmed. And promotional efforts outside the network on-air universe are looking very different. Marketers need more efficient and influential ways to promote programming and reach consumers beyond paid advertising. This marketing channel was already on a [downward trend](#) in terms of swaying audiences. And, of course, once those budgets are cut, they'll be harder to reinstate in the future.

ACTION

PIVOT ADVERTISING STRATEGIES

Enter social media, which brings people together like no other medium today to discuss and share their favorite television moments. Organic social media posts provide the cost-effective promotional content showcase that marketing teams are looking for today. Marketers could use some cost-free help in getting all that compelling

content shared and seen.

Fortunately, every television marketer has a built-in advertising alternative at the ready: a pool of passionate, socially savvy brand advocates in the form of network talent. Stars, personalities and creators have large, engaged social media followings that marketing teams can leverage to message these audiences. These show casts, on-air commentators, producers, directors and crew — even network creative executives and superfans — are already in an ideal position to expand brand awareness and build stronger bonds with viewers.

Creative advocates are becoming critical allies not only in sharing produced tune-in promos and episode clips and showcasing the new behind-the-scenes life on set to their fans. In this time of production upheaval, they are the new central way marketers can keep audiences firmly engaged with network brands and key initiatives, by creating their own authentic and original short-form content.

For example, the cable marketing teams we work with at [Greenfly](#) have tapped into their influential series talent to carry on creating and sharing photos and videos while they're on hiatus. They're recording PSAs for current network pro-social initiatives, such as those promoting public health messages. These advocates are also filming their personal perspectives on their shows to keep viewers engaged and show brands top of mind during their break. And as casts and crews get back to work and new episodes begin airing, they will continue these brand

advocate activities to boost fan excitement. Budget shifts bring an opportunity to be more efficient and creative with existing resources, including the human resources that you may not have thought about before.

TREND #2

REMOTE, SCALED-DOWN PRODUCTIONS BECOME MORE COMMON

In the spirit of “the show must go on,” many programs (new and current) have been forging ahead with remote, [lower-budget](#) versions of their planned productions. Our favorite shows may look and feel very different, at least for a time.

We've already seen numerous examples of these home-grown filmings. They have included daily talk show personalities hosting from their garages, *Saturday Night Live* and various fundraisers as live virtual offerings, the NFL Draft with many remote feeds, and classic series reunion specials. All of these have featured live or taped broadcasts, with on-air and show talent performing safely at home.

Many tentpoles like the Emmys® have gone virtual, as well as the publicity events leading up to these shows. Others, like the *MTV Video Music Awards*, have been staged without audiences. Gone are the expensive and logistics-heavy red carpet tapings,



screenings and parties. They've been replaced by online broadcasts and more social media activity to fill in the content gaps, which will likely carry forward at least into next year, if not beyond.



[News, short video and other mobile-friendly program formats](#) have grown in popularity during this time. Nimble alternative formats that allow for more production and post-production flexibility and household co-viewing, such as animation and documentaries, have become more attractive to both audiences and programming departments. Their [enthusiasm is already starting to wane](#) as popular studio and location produced scripted shows, and [less expensive unscripted shows](#), get back to work and fine-tune how they can safely proceed with filming. But networks have been able to gather valuable viewer preference, content discovery and consumption data through this period of format experimentation. They've learned more about what alternative programming works across their business, to inform any future production shutdowns.

In each case, marketers should note that mobile will become more important to

the entire lifecycle of content — from production and distribution to promotion and consumption. This trend is particularly true in the area of remote collaboration. Many shows will continue to forge ahead with virtual writers' rooms and production offices, and shoot with only skeleton crews, at least for a while. We've seen this on the reality show front, as talent have recorded their "confessionals" at home with one socially distanced camera operator.

These pared-down, distributed activities bring some challenges with communication but opportunities for even more creativity and [diversity in storytelling](#) across platforms. There likely will be some COVID-related storylines in next season's programs to help account for some of the filming differences. And producers have been [remotely directing and "upskilling" talent](#) to self-produce usable video. In some cases, they're sending technology kits with iPhones and other recording equipment, and providing virtual training to create their own at-home sets.



ACTION

RECOGNIZE THAT MOBILE IS TRULY FIRST

In this world, the right mobile-first tools to produce and exchange content easily will be critical to speed it to air and get it in the hands of hungry audiences. Even though consumers may have less mobility at this particular moment, they're still increasingly watching and sharing video and social media content on their mobile devices. They continue to seek real-time connection



and conversation about their favorite entertainment offerings, and [mobile remains their social screen of choice](#) for that.

To jump on this trend, we've seen many network marketers ask above-the-line and below-the-line talent advocates to create videos and photos about their lives and work at home during the production hiatus, and submit them back through their mobile devices. For example, animated program voiceover talent, who are working at home, record their perspectives on the process. That submitted media gets instantly shared to brand social channels for audiences to enjoy and learn more about their favorite stars and shows.

Remote and virtual productions can serve as a catalyst for television marketers to bring more engaging content to audiences via mobile and social media today.

TREND #3

CONSUMER SHIFTS FROM LINEAR TO DIGITAL PLATFORMS ACCELERATE

We've seen content demand and overall television consumption rise exponentially this year, particularly in the early COVID period. [New viewing behaviors](#) and popular dayparts have emerged, and consumption priorities have changed. For instance, an Ofcom study on U.K. [viewing habits](#) earlier this year found that adults there spent

an average of 40% of their waking hours watching content during the first few months of the global crisis. They also significantly increased both their total screen time and subscription OTT service usage.

Some consumers have mostly reverted to their previous viewing patterns as areas have slowly returned to more normal flows of society. But others have not — and likely will not — moving forward. While a recent Deloitte research study points to consumers nearing their limit on the [number of streaming services](#) they'll carry, that same research showed that 23% of respondents actually added at least one new paid streaming service during the COVID period so far. And in that previously mentioned Ofcom study, more than half of the surveyed adults with new streaming subscriptions said they would retain them and spend the same amount of time watching them from now on.

The [deep audience erosion from linear television](#), including some double-digit cable rating declines in recent years, is becoming painfully obvious. Add to that the difficult economic situation, and cheaper, more attractive content alternatives will continue to be top of mind for consumers for quite some time. People are hastening their move to nonlinear [digital and mobile entertainment options](#), including streaming OTT services, gaming consoles and esports, and social video platforms. They're attractive for their deep content libraries, on-demand flexibility, lower subscription costs, and, often, fewer ads. They even have live sports, the last remaining bulwark for linear programming's survival.



It's no surprise that researchers expect the [average time spent viewing digital video](#) among U.S. adults to increase nearly 20 minutes this year to over 2 hours daily.

ACTION

RETHINK CONNECTION POINTS

In light of this, networks are starting to prioritize nonlinear business lines, bringing their own brands into both subscription- and advertising-based streaming environments. WarnerMedia with HBO Max and Disney with Disney+ are just a few of them. Marketers are thinking about their properties holistically as they shepherd both linear and nonlinear brands in a sea of competitive offerings. For either one, they need to prioritize audience engagement now more than ever. This bond will be a crucial differentiator to ensure network and service retention in such an uncertain era, when audiences have been trained to find the specific programs they love at the expense of network brand loyalty. To accomplish this, they need to be where viewers are and feed them content in the style they want, from the people they want: the talent.

As consumers have emigrated to mobile and digital platforms to find content (even while they're watching at home), social media has further solidified its position this year as their central meeting place. This fact is particularly true for Millennial and Gen Z viewers, but increasingly, older viewers as well. Although usage trends are expected to moderate as society continues through

the pandemic period, [eMarketer predicts an uptick in usage from earlier forecasts](#). A Morning Consult study found that nearly [25% of respondents expected to use social media more](#) after the crisis.

Within the top social networks, [Instagram and TikTok](#) are increasingly where these viewers are flocking to see the latest content from television brands, as well as [talent](#) and creative teams, who are the conduit for building tight audience attachments. And that stands whether the content and advocates represent top show brands or new ones that have emerged in this time of dislocation.



Social platforms also enable marketers to quickly see how content is resonating with audiences. By tracking engagement on cast social channels, teams may discover insights into audience demographics, sampling behaviors, favorite characters and new storyline ideas that might have been difficult to uncover otherwise.

The television social marketing teams we partner with are harnessing these trends. They're distributing content from their linear and nonlinear brands to creative teams



(both in front of and behind the camera) for timely sharing to their social followers. Talent advocates are posting behind-the-scenes moments for content filmed before shutdowns; archived clips, tune-in promos and episode sneak peeks for programs; and watch parties and virtual events currently airing or being readied to air. For example, one of our sports media customers with both linear and streaming channels distributes clips to on-air anchors from their home-recorded telecasts to entice fans to stay tuned in. A streaming service social team requests promo content from talent at home since they're not doing photo shoots or recording clips on set at this time, and they're banking them for when their shows start re-airing.

“Social is the bulk of our marketing plans these days, and we’re taking a talent-facing approach there. Going forward, social will be more important than it has been before. Brands are showing other brands that don’t believe in social so much the power of it.”

***- Crystal Johnson
Director of Social Media, BET+***

The consumer shifts to digital viewing environments continue unabated. Rethinking how to engage with them on digital and social platforms is the shortest path not only to meeting them where they are today but where they will be tomorrow.



TREND #4

PRODUCTION CYCLE GAPS FORCE CONTENT CHANGES

2020 is forcing many shows into new production cycles and indefinite hiatuses. Some programs stopped filming while they were already airing current season episodes, and are now in forced mid-season breaks. The annual spring pilot season for the broadcast networks was also upended.

Consequently, [few scripted broadcast shows are launching on time this autumn](#). Cable and streaming services, with their year-round show timelines, have more completed programs in their arsenals. The traditional fall TV broadcast season, long in a slow decline, may finally be shown the door. And coming off the loss of the Summer Olympics to keep people glued to their screens, anchor sports broadcasts for the rest of 2020 are anything but certain as pro and college sports leagues are continually evaluating the viability of playing their seasons. Viewers who can't find their favorite programs will just find something else to watch, or [some other way to watch](#). Marketers could end up losing them for good.

With frozen content pipelines and less money available to commission new scripted programming that could fill the gaps, networks and streamers are looking at other options — much like they've done during past strike periods when production also came to a halt. Teams are exploring alternative formats and cheaper



international content. They're re-airing or repackaging classic library content and scheduling more repeats and clip shows. They're also having [corporate synergy discussions to share content](#), such as between their previously mentioned linear and streaming services.

[There were more scripted shows than ever at the beginning of the year](#). So there's still a lot of content to schedule and promote for now. However, executives are planning and content shopping to stay ahead of things and give themselves flexibility in a dynamic and competitive market environment that is driving up the prices for choice programming.



EMBRACE NEW OPPORTUNITIES TO BE CREATIVE

All of this activity is spurring new opportunities for marketing teams to think creatively about how to package and promote the programming they have. The winners in this period will find new ways to reach audiences or risk losing them to other entertainment options that are continually pushing out fresh content. And, of course, knowing how to attract new eyeballs will always be on-trend.

One way to approach things differently is by working with network talent departments to encourage show talent and creative team participation in social media off-cycle and year-round. There's no reason that a production hiatus should stop how brands

interact with audiences, even in typical times. People don't lose interest in their favorite stars and shows when they have to wait a few months or even a few years for their return. This is particularly true when they've been anticipating and discussing the next season regularly on social media. Marketers can use this time to strengthen their relationships with talent and give them the tools to do the same with their fans and followers.



Image Source: @therealchndracurrelley. Instagram. June 18, 2020. <https://www.instagram.com/p/CBloXD8Iznv/>

Many of our television customers have been encouraging show talent and creative executives to share behind-the-scenes photos and videos of key scenes that were shot and aired (or not) before hiatus, with their added personal commentary. What better way to keep fans invested in the future than by sharing tidbits of what they might have missed and what's to come. Fans find camaraderie in this shared uncertainty. Other networks have been utilizing talent to help promote anchor programming events, [like multi-part series](#) that have been among the highest viewed events this year. And many are finding their talent share content with their brand teams proactively. They



want to talk about how they may be thinking about a particular scene or special moment of filming.

This year is also a golden opportunity for teams to start encouraging more fan media for brand social channels. Mobile and online tools exist today to make it easier than ever to build campaigns around passionate fan communities. Marketers can solicit these groups to recreate their favorite scenes, share how a show or sports moment inspired them, or what they're most excited to see next. Such advocate-generated content from fans is popular in this time, as people seek bonds with others that share the same passions.

Production gaps can prompt the use of fresh voices to occupy a lean promotional calendar and keep audience connections strong all year long.

TREND #5

NEW SHOWS, SERVICES AND INITIATIVES LAUNCH IN DIFFERENT WAYS

Despite the many challenges in getting content to air this year, long-planned launches will continue to push forward, albeit in potentially different ways. That includes [new streaming services](#), series and initiatives. The promotional efforts surrounding these activities will consist of more digital tactics than ever before,



building off a combination of all of the trends mentioned above.

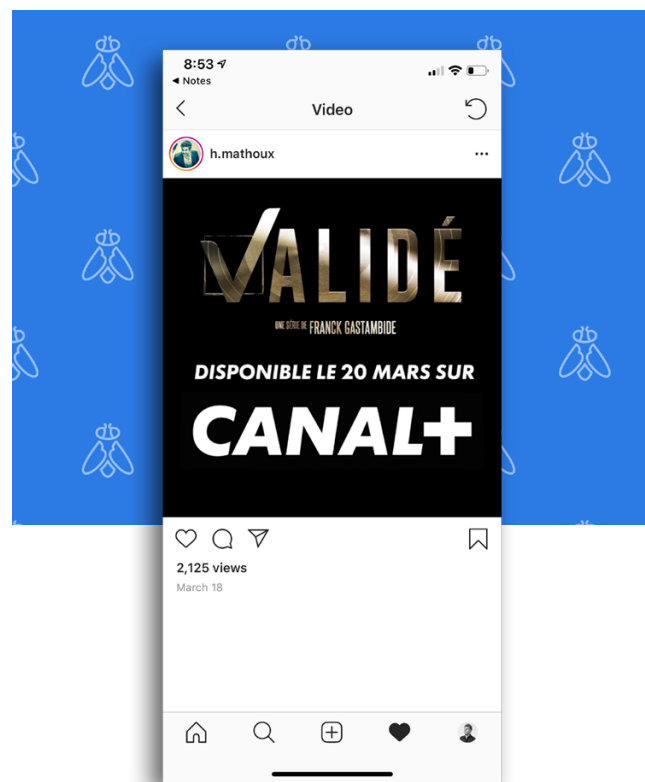


Image Source: @h.mathoux. Instagram. March 18, 2020, https://www.instagram.com/p/B94fQw-Km_S/

Television has always offered society a place for unification. Audiences once gathered in groups around one screen to watch and discuss live global events as they were happening. This year, they collectively latched onto *Tiger King* as it launched in March, for an early lockdown escape. It elicited a variety of responses but featured talent who knew how to drive the public discourse with a lot of authentic social content. Viewers quickly binged that series across many screens — and spurred others to watch — at many different times. They found they could still instantly discuss the show with people from all over on social media. And that helped grow the show's audience and Netflix's brand even more.

Tiger King became [a bonafide hit on the service](#) and the COVID Age poster child for launching a new show to a highly captive, digitally-savvy audience.

In many cases, [digital and social platforms](#) are taking the place of press junkets and outdoor and experiential media to promote new programming and enable audiences to immerse themselves in it.

Consumers could once drive by daily billboards reminding them to tune in to a new series or network but now get those same reminders indoors on social. Or they could visit [promotional pop-ups](#) and tour elaborate staging sets full of props and costumes to whet their appetite for great new content. These offerings have been replicated online in a time of social distancing with virtual versions of these temporary environments. For example, BET+ supported its recent launch of *Tyler Perry's Madea's Farewell Play* with a [virtual museum](#) celebrating the iconic character's legacy, complete with a costume exhibit, gift shop, music hall of fame with performance clips, and more.

ACTION

CONSIDER FRESH, AUTHENTIC APPROACHES

With social media more critical than ever to how audiences discover and consume new content, industry marketers are finding they can launch television brands with their talent in ways they perhaps weren't anticipating even at the beginning of the year.

Amidst the early days of the global crisis, [CANAL+](#) was planning its own March series kickoff but gave its talent easy-to-use mobile technology to share tune-in and other promotional content directly with their social followers. With distributed teams and talent advocates, Greenfly helped the CANAL+ social team drive awareness of its launch of *Validé*, which garnered 15 million views on MyCanal — making it the most successful premiere in their history. Top talent, including sports presenter Hervé Mathoux, shared promotional content to support the launch.

Marketing departments we work with are exploring other promotional approaches to launching new programs, service offerings, or even corporate campaigns. These include prioritizing collaboration between production and distribution partners to co-promote content through each of their respective talent and creative team rosters. Some are leveraging their ability to efficiently send a request to their talent pool all at once, asking them to create content to hop on trending topics and network initiatives. Those who may have more time on their hands right now have been even more receptive. Other teams develop curated galleries of photos and videos that talent advocates can select from on their own to build their personal, authentic stories.

This year has become an opportune time to test new strategies for reaching potential viewers and subscribers, as people are game to see what networks can cook up to serve them now and going forward.



FINAL THOUGHTS

2020 is the year of change, and being successful means embracing that change. Marketers who jump on these five trends as they emerge and implement these strategies will come out of this disruptive period even more connected to their most valuable audiences. They will also have cemented relationships with some of their most critical resources: their talent and creative teams.

Together, they'll be better prepared for whatever the next age of television turns out to be.

DISCOVER GREENFLY

Greenfly, the leader in brand advocacy, enables organizations to fuel brand love through authenticity. The company's brand advocacy platform is helping TV and entertainment brands get through the COVID Age with remote collaboration and communication capabilities, helping entire teams connect and share short-form media.

Sports, media, and entertainment organizations depend on Greenfly to both share media galleries as well as collect original photos and videos from their advocates. This authentic content helps both the advocate and the organization build deeper, more personal connections with followers on social media. Greenfly has helped transform their advocates into brand builders by harnessing the power of authentic content.

If you're launching a new show this fall — or bringing back a series — let us know. We can activate your talent to create buzz, build trust through personal endorsement, expand your social reach, and create deeper audience connections.



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