

A photograph of two young women outdoors. One woman on the left is smiling and looking at her smartphone. The woman on the right is sitting on a concrete ledge, also looking at her smartphone. The background shows a blurred outdoor setting with trees and a building. A large black diagonal shape is overlaid on the right side of the image, containing the main title text.

Storytelling for Millennials, Gen Z... and more

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Storytelling for Millennials, Gen Z and more...

This White Paper produced by Prensario for Reed Midem offers a comprehensive guide to the different storytelling requirements posed by the new generations of viewers that have been raised immersed in an environment placing at disposal fast Internet access, video game consoles, smartphones, social networks and, more recently, Real Time Communications, which allow them to instantly interconnect with anyone in the world, speak freely to people they never met before, play games with or against them and exchange unlimited voice, data and video messages with newly acquired friends and also outsiders that might turn out be dangerous.

To traditional media such as linear television, but also phone and computer manufacturers, as well as telecommunications service providers, these young customers are crucial because they may signal the demise of decades-old industries that looked firmly established a few years ago. The downfall of wired telephony is an example of this trend.

An unprecedented wave of original television programming, a trend known as Peak TV, has been trying to retain them through more complex stories, international co-production, higher budgets and other resources. Broadcast networks are slashing programming reruns, a common practice a few years ago. But, to be successful it is also necessary to understand who these new viewers are, how they differ from traditional types, what they think about the world around them and what is required to attract their attention. At this White Paper we are proposing an array of concepts obtained from research, personal interviews, available data and a large number of outside reports and statistics from reliable sources that have been working on this issue.

We expect this White Paper to be useful to network executives, showrunners, producers, writers and analysts around the world. While there is a certain focus on Latin America, we believe our findings and conclusions may be useful to all businesspeople, no matter where they work from.



Introduction

For decades long, it had been assumed that television viewers would watch television programming passively, alone or at a gathering with family and friends, at a certain pre-established schedule.

The irruption of Internet communication in the Nineties, and the further development of smartphones and videogame consoles more sophisticated than the initial ones, have changed in the past few years this landscape of **passive** audiences, waiting for things to happen, into a combination of **active** and passive watchers, with younger audiences tending to interact with the content and influence, if possible, the plot.

This generation of viewers has been generally denominated **Millennials**, a definition widely applied to people born between 1980 and 1995. Millennials would be now between 23 and 38 years old. Apparently, the idea behind this appellation was that they would be “active” by the end of the second millennium, but the nickname became vastly more popular and continues being applied to people of non-traditional behavior, in this case compared to traditional collective media listening (radio, music) and watching (pre-packaged television, pre-recorded video).

Talking a different language

Formative experiences	Maturists (pre-1945) Wartime rationing Rock'n'roll Nuclear families Defined gender roles-particularly for women	Baby boomers (1945-1960) Cold War 'Swinging Sixties' Moon landings Youth culture Woodstock Family-orientated	Generation X (1961-1980) Fall of Berlin Wall Reagan / Gorbachev / Thatcherism Live Aid Early mobile Technology Divorce rate rises	Generation Y (1981-1995) 9/11 terrorists attacks Social media Invasion of Iraq Reality TV Google Earth	Generation Z (Born after 1995) Economic downturn Global warming Mobile devices Cloud computing Wiki-leaks
Attitude toward career	Jobs for life	Organisational - careers are defined by employees	'Portfolio' careers - loyal to profession. not to employer	Digital entrepreneurs - work 'with' organisations	Multitaskers - will move seamlessly between organisations and 'pop-up' businesses
Signature products	Automobile	Television	Personal Computer	Tablet/ Smartphones	Google glass 3-D printing
Communication media	Formal letter	Telephone	E-mail and text message	Text or social media	Hand-held communication devices
Preference when making financial decisions	Face-to-face meeting	Face-to-face ideality but increasingly will go online	Online - would prefer face-to-face if time permitting	Face-to-face	Solutions will be digitally crowd-sourced

Source: Barclay's

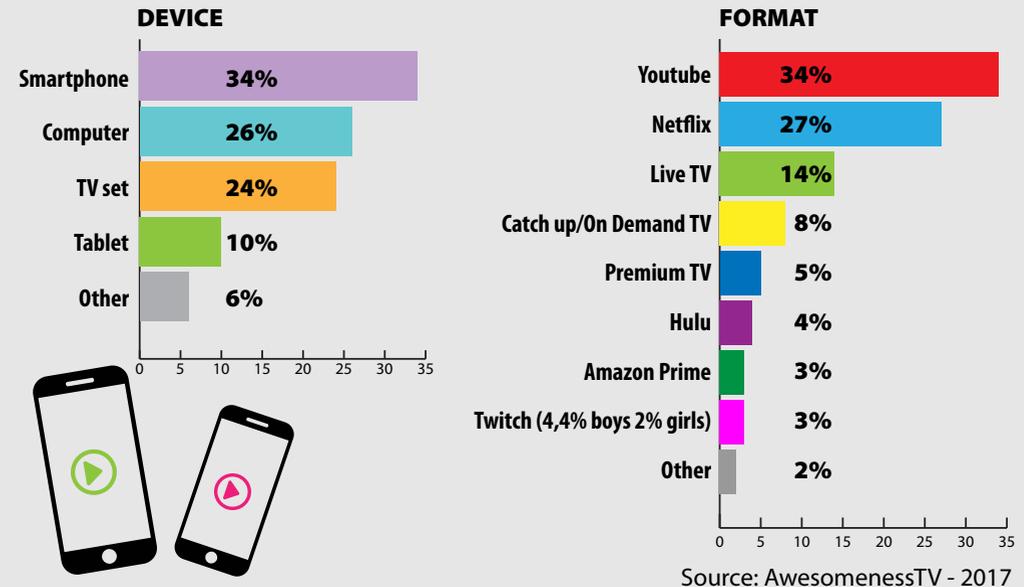
Those born between 1995 and 2010 are usually known as **Generation Z** or **Centennials**. According to this classification, this demographic group (name usually shortened to **Gen Z**) would be now aged from 8 to 23. A new **Generation T** denomination has been proposed for those born from 2011 until now. The obvious problem with "Z" is that there are no more letters left in the alphabet. The "T" has been proposed (instead of "Z2") as in "touch"; Marshall McLuhan used "tactile" to describe linear television in 1969. There are few precisions on this issue.

We will acknowledge this for the time being, with a comment. According to the data gathered for this White Paper, it might be more suitable to define this new generation as "F", for "Float". That's because, more than the physical act of touching everything, which they do, their mental attitude, already seen in the Gen Z teenagers but reinforced in those born after 2011, is to 'float' above the most varied circumstances. They don't commit themselves to anyone or anything specific and maintain a 'horizontal' strategy of comprising a wide array of subjects but avoiding specific compromises with any of them. Yet, they have firm belief in what they do accept.

This non-commitment viewpoint should not be confused with the immersive aspects of their media experiences; the difference is that they don't change their points of view due to these experiences, despite paying them full attention. We'll discuss it in more detail at the specific "storytelling for Millennials" section, later in this White Paper. All in all, being identified as "Gen T" or "Gen F" does not change the approach needed to understand them.

Entertainment Snapshot

Video consumption: 71% of teens typical entertainment consumption is streaming, and one-third is viewed from a mobile device



But, we have chosen to undertake this in a different way: instead of statistical age, we'll examine the communication devices (the PC in the case of Millennials, the smartphone, videogame console and High-Speed Internet for Gen Z, Real Time Communications for T or F) that have been first available to newborns and toddlers, influencing their perception and reasoning procedures.

While there are several ways to approach the differences between these young age groups as consuming entities, our research suggests that focusing on device availability could be one of the best ways to understand the changes in behavior from the traditional "couch potato" —the somewhat derisive nickname applied to those who spent several hours a day watching programming coming from a limited selection of channels—, to the need of being satisfied through the delivery of emotions (positive, such as pleasure, fantasy, or negative, such as hate or shame) in a matter of seconds or, at least, between two and three minutes. This **inborn impatience** and the need of **instant gratification** experienced by young audiences are shaping today the profile of successful storytelling. We'll discuss these matters along this White Paper, explaining our findings through statistics from different parts of the world, with major focus on Latin America.

The change in audience approach does not result from modifications in human nature. It has been known for decades that a good music piece or the likability of a new acquaintance are usually acknowledged by a sensible person in a matter of seconds. While no one would rush out of a meeting with a new person in a matter of seconds because the first impression it has caused is not agreeable, this politeness is being increasingly left aside when it comes to audio and visual content experiences. The unconscious influences behavior more actively.

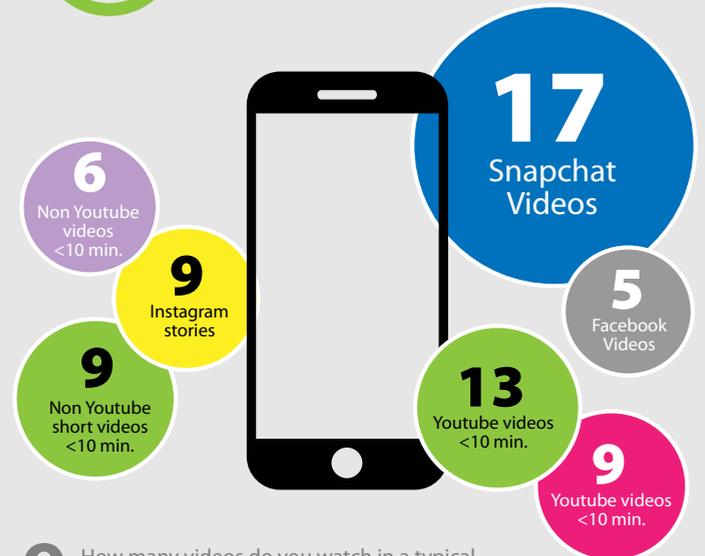
An individual experience

The wide content availability conspires against collective watching. In a group, other people watching at the same time may feel not at ease

Gen Z watches a lot of video content



Gen Z watches 68 videos a day



Q How many videos do you watch in a typical day and across which platforms?

Source: AwesomenessTV - 2017

if their visual or sound stream input is interrupted by, for instance, switching channels. Psychological research shows that part of their sudden unrest comes more from the fact they feel they have been deprived of their control over the device being watched or listened to --in this case the TV set or music player, among others— than from their own evaluation (like/dislike) of the content. What a youngster does in such a situation is move away and play videogames or watch video streaming in some other place. This is the core of an individual experience. Kids or youngsters that refuse having TV sets in their room are becoming commonplace, but smartphones and desk computers or tablets are mandatory nowadays.

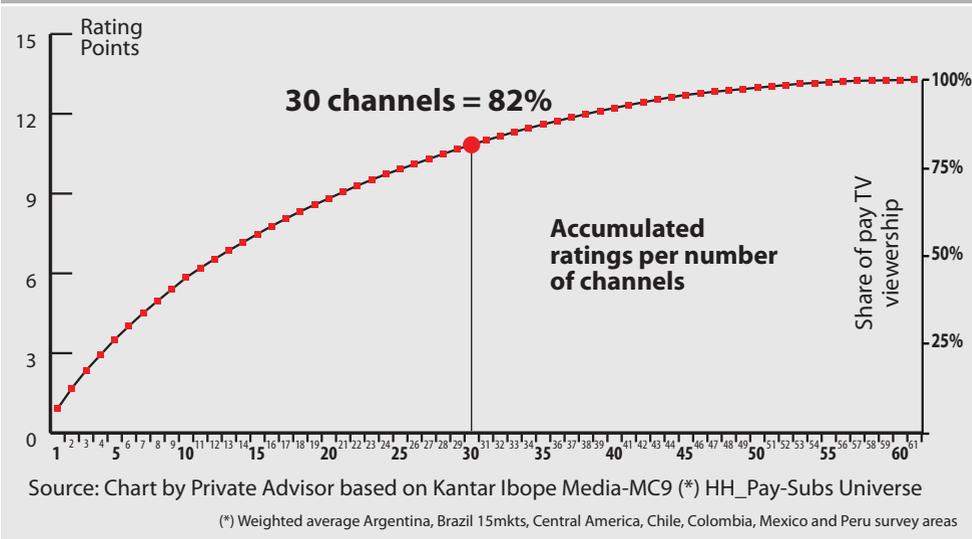
User data shows that grown-up people watch customarily no more than six to seven linear television (we'll call them LTV) channels. This, no matter how many are offered to them --say, through a cable or satellite pay subscription. And, about thirty channels usually account for 80% of the total audience ratings despite a choice of 150+ channels.

By contrast, digital platforms and video streaming have taught Millennials that 'there's always something different within reach' and turn them into highly impatient subjects, erasing the "channel" concept. They no longer accept waiting for something. This dilutes any eventual adherence to an established format; it is replaced by a search for emotions that will keep their mind --and guts-- active.

This dramatically affects storytelling and script writing concepts. It has also been the reason for a deluge of new original programming being turned out by Hollywood, major independent producers and newcomers.

Every year, thousands of people submit their creative ideas to agencies and producers for consideration, hoping they will hit the jackpot with their approach. Unfortunately to them, the success rate for unsolicited "pitches" (the presentation of a content idea to a potential buyer, partner or investor) has proven to be very low, in the order of 1 in 1,000. Contests hosted by talent agencies, television networks and institutions promoting audiovisual creativity deliver more positive results, but still low: 1 in 300 to 1 in 400. And, most projects must be adapted

Latin America: 30 cable networks account for 82% of viewership



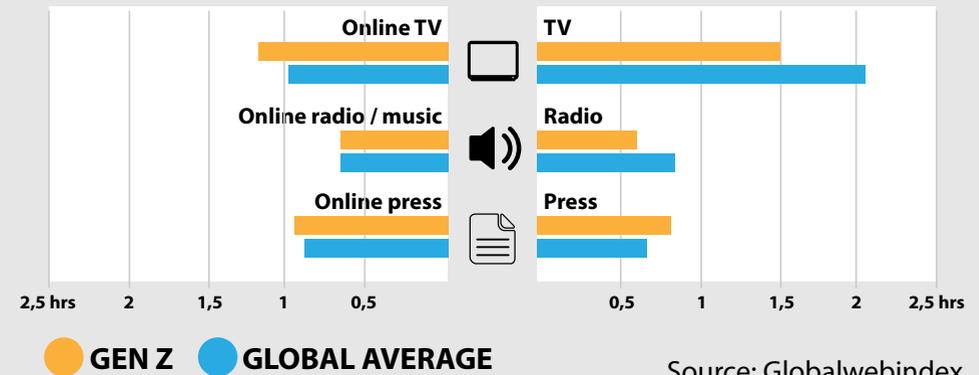
to the particular needs of the buyer, implying the original author will have little say in the finished product. It may take from one to three years from the pitching instance to the screen release. Therefore, new programming depends more on the established –and trusted—players than on newcomers, who are statistically rare. This explains why, at this moment, a number of legacy TV series –such as *Will and Grace*, *Murphy Brown*, *Frasier* among others— are being considered for revival. But their chances for success look slim, because the core audience has changed. And it is migrating to online content delivery.

The problem with the migration to digital, as French specialist Bruno Patino has pointed out, is that ‘digital media create new viewership patterns, but destroy existing business models’. Portrayed as “cord-cutters” and “cord-nevers”, this defines those who have migrated from linear television to digital streaming platforms –a.k.a Subscription Video on Demand— or just never enough paid attention to prepackaged programming. Their exodus is slashing the established advertising-supported business without providing a strong, profitable basis for unscheduled programming. Many advertisers are flocking from regular television to digital platforms, to find there that these evasive young audiences have too many ways to avoid watching regular advertising, namely “spots” where the virtues of a certain brand or product are declaimed. They will, yes, accept watching, even seek sales pitches, if related to something they are actually searching for. But that’s it.

The advertiser’s problem is compounded by what has been defined as **Ad Fraud**: spots or banners that are placed at websites outside the advertiser’s “comfort zone”, those without validation or verification or with an image that may damage the advertiser’s reputation: for example, those spreading **Fake News**. Trade website *eMarketer* recently defined this as ‘a plague’, quoting a recent test by Guardian US as advertiser, programmatic partner MightyHive and Google that revealed that ‘unauthorized players’ were ‘pretending to sell Guardian inventory and reverting the revenue to themselves’. Of the inventory purchased without validation, ‘72% was fraudulent’. This issue will have to be solved if the digital platforms applying programmatic advertising want to avoid a clash with their clients.

Media consumption habits

Gen Z vs. Global average



Along this White Paper, we will explore the new behavior fundamentals imposed by these emerging audiences. And suggest what can be done, in terms of storytelling and content production, to attract or bring them back to linear content. It will probably be a combination of legacy television and fulfilling the actual requirements of people who want to be part of the story, more than just passively watching it. French analyst Bruno Patino has a definition for this evolution: the **gamefication** of television.

The new consumer

Research has found that the human brain develops mainly between birth and age 5. Of course, there are further changes until late adolescence and adaptation efforts along the entire life of this person.

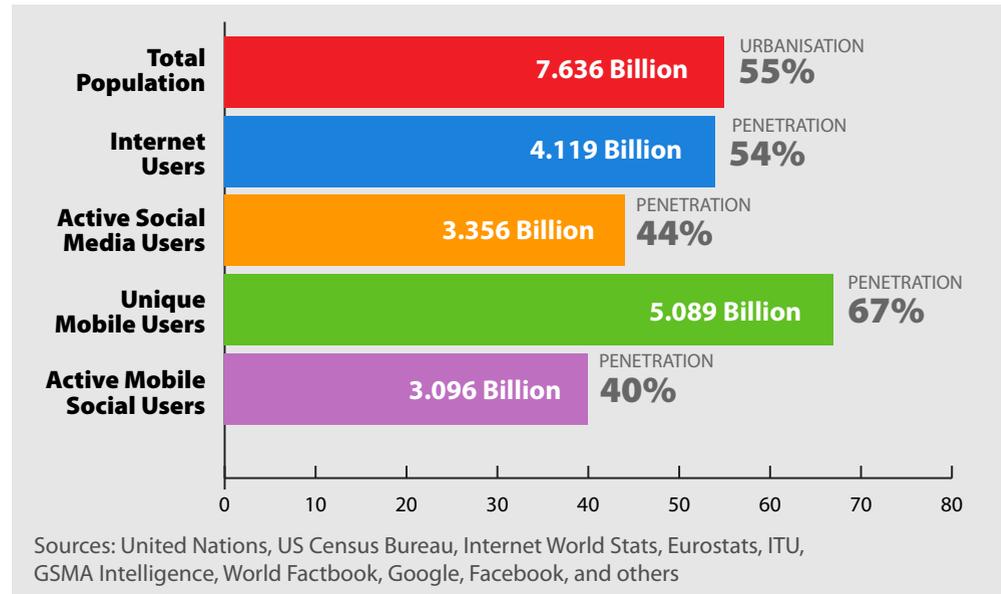
So, the question should be: **What happens when a baby notices that smartphones exist, prior to being eventually attracted by a television screen?**

A smartphone has all the elements needed to attract a baby's attention: it is portable, flashes lights, carries buttons that may be touched, produces weird sounds. It is not physically dangerous to the infant, since it is large enough for not being swallowed. And, both Mom and Dad seem fascinated by talking to the device, listening to noises that come from it and eventually moving their fingers on its surface. Nothing that the baby cannot try to replicate.

The smartphone is "touch and happen". It reacts immediately to any interaction, without a displacement. This makes it different from most other things that a baby can reach. So, a short-reaching baby immediately finds a companion that does not escape the length of her hands and will resist reasonable mistreatment without complaints. A best friend, until the enfant gains enough strength to start throwing it away.

The smartphone has no schedule. Of course, it is taken away from the baby when the parents want to use it, maybe to speak into it, or just

Worldwide digital penetration 2018



watch its screen with a sympathetic smile. To Baby, these strange procedures are sort of a door to a venturesome future. And, it also may happen that the grown-ups will find it pleasant to see their child playing with the gadget just to leave them in peace.

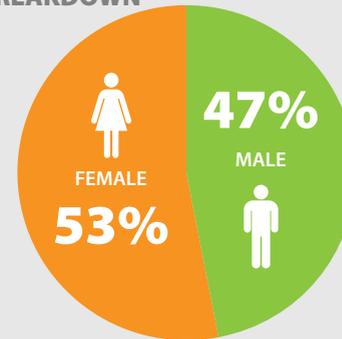
These initial synopsis (neural connections) within the baby's brain are essential to understand future behavior and comprehension of what happens as a toddler, a child, an infant, a teenager: we may argue that "the wiring" is built differently than when the first gadgets to play with were unanimated, such as a teddy bear. Last but not least, when television screens appear in life, many babies try to change the image on the screen by touching it, are disappointed when nothing happens. An older custom is to watch television from a very short distance, which could be bad for their eyesight; their real goal may be to make the experience more immersive, but they'll have to wait for a game console for that.

Geographical and cultural differences

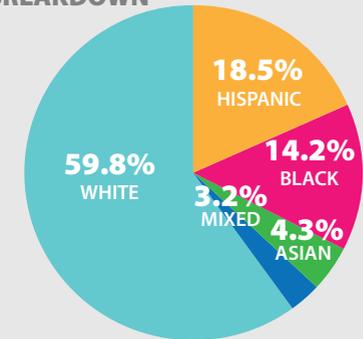
Of course, not all the babies in the world are subject to this type of media initiation at the same time: those born in places where few people own portable phones and even less have smartphones and connectivity, will grow, at least initially, under different behavior patterns. Religion and tradition are equally influential on future behavior: they reinforce the gap between "good" and "bad", as we'll see later. This establishes different mental patterns, changes content evaluation and expected character behavior rules, as it happens with television content from Turkey and Asian countries.

Who are the millennials?

GENDER BREAKDOWN

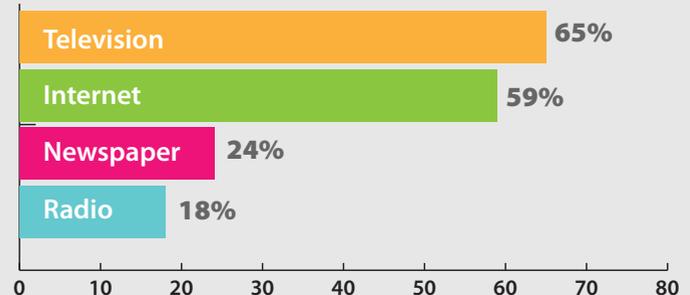


RACE BREAKDOWN



MAIN NEWS SOURCE

It wasn't too long ago that newspapers and radio were the leading news sources. This technology friendly generation prefers to find their news elsewhere



Source: Koeepel Direct based on data from different sources, such as Deseret News, Pew Research, Entrepreneur, Clickz, US Chamber Foundation, Videonuze, and Mashable

Storytelling for Millennials, Gen Z... and more

Statistics show that, on a worldwide level, the smartphone is the most desired device to be owned by populations of all nationalities and culture. This, due to the universal need to express oneself and, equally important, be appreciated and respected by others. To Millennials and Gen Z, fame and prestige are more important than fortune; they care more about what their close friends think about them, than about their parent's evaluation and wishes. This is the basis for the growing influence of "world of mouth" among these demographic groups. As factories churn out less expensive models and the telcos offer "pay as you go" plans, millions of new customers find it affordable to own such a device and start sending and receiving messages that make them feel important to their family and friends.

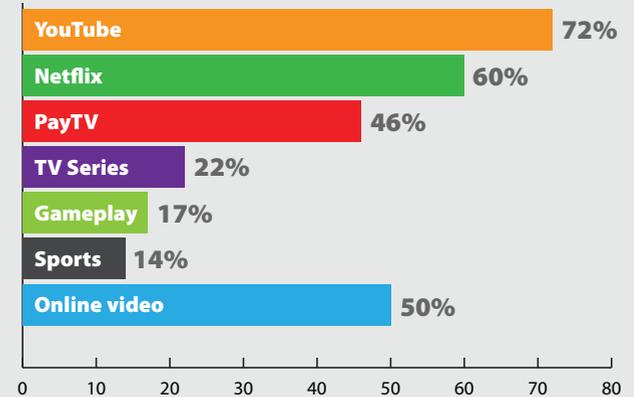
After this first yearning has been fulfilled, the user will start exploring outside connections. Social media such as Facebook, Instagram, Snapchat, Twitter and others are a magnificent way to peek into other people's life and achievements, according to the user's profile, ego and ambition. True, language, religious and political restrictions apply against universal communications, and another crucial element appears: the user's unconscious often dictates the tone and sentiment of his or her messages.

Fake news become so powerful –and so difficult to fight— because the link is established with the unconscious section of the receiver's brain. As a consequence, the child becomes strong-minded about those things that have been captured first by his or her brain. This will be increasing difficult to change from the outside in the coming years, though toddlers, children, later teenagers, may change points of view by themselves according to the experiences suffered or enjoyed in the rest of their life. Along time, filters will be self-installed in the mind to protect it from

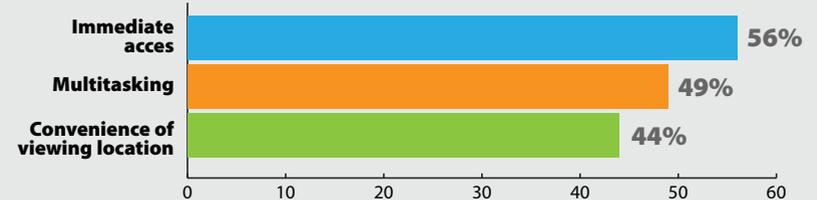
Media Engagement

The millennial generation takes media consumption and engagement to an all-time high

Spend 18 hours a day consuming media

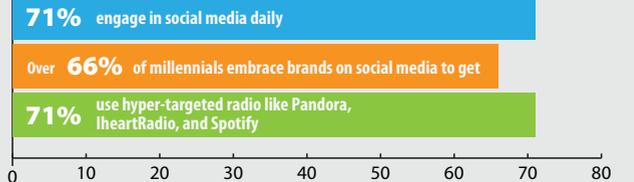


Why are millennials choosing online viewing?



Check smartphones 43 times per day

5.4 hours per day on social media



Source: Koeepel Direct based on data from different sources, such as Deseret News, Pew Research, Entrepreneur, Clickz, US Chamber Foundation, Videonuze, and Mashable

receiving news or commentary that may be disturbing to existing beliefs; all in all, it is very unlikely that media of any type will be able to change substantial viewpoints in the future decades.

Generation Z people hate perceiving a lie in the messages –written, spoken— they receive. This attitude will be important when we consider video programming (be it linear TV or digital) and its reach among this age group. AwesomenessTV -- an online production company originally owned by Comcast (Via DreamWorks SKG), Verizon and Hearst, purchased by Viacom in July 2018-- cuts this age group at the year 2011, and considers that Gen Z ‘can be explained using words such as stressed, global, guarded, fluid identity, rule breakers, niche and tech-natives’, among others. We’ll later study these attributes.

The War of the Worlds and beyond

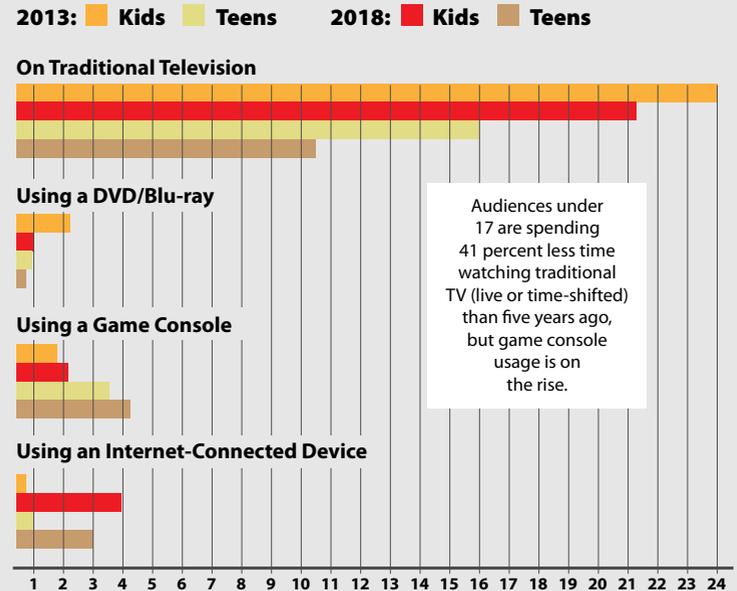
Fake news may only access the human mind if their message is friendly to earlier beliefs. Otherwise, they will be rejected or just ignored by the safeguards “wired” in the brain. Yet, that person might not have preinstalled protection against a different issue and will not unconsciously block these messages.

Orson Welles’ radio transmission of *The War of the Worlds* was the first acknowledged case of fake news, and its effect has been enough documented. At the start of the emission, it was said that a fictional story was to be heard, but apparently few people heard the warning or paid attention to it.

Now, consider this: if we dig deeper into the movie history, the first Lumiere shots of a moving train that frightened people by simply arriving at a station, in 1895, were also fake news. This, because the audience, at that moment, was reportedly ‘astonished’ by what it feared was a locomotive ready to crush them into small bits. They believed it, despite the fact that the scene is shot from a station platform (not the rails) and

Weekly Time Spent on Entertainment

Gaming and smartphones have effectively replaced traditional television for kids and especially teens



Source: Nielsen Total Audience Report - Age range: kids 2-11, teens 12-17

the train is not shown at any moment advancing towards the viewer, but going sideways. Applying our somewhat irreverent definition of “wiring” of the brain, we can think that, at that time, regular people were not prepared for the type of visual experience delivered by the Lumiere brothers. Today, the arrival of a train at a station is, in itself, boring if not outmoded. Moviemakers and showrunners apply it most exclusively to signal a change of location –maybe of lifestyle-- for the characters, or as a proper place for a meeting. In this globalization era, airports are more adept to decor these plot changes, but they appear less romantic to many audiences still emotionally related to terrestrial transportation.

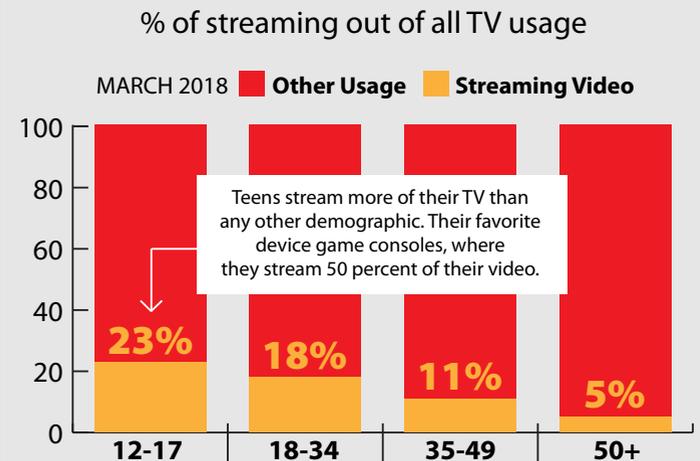
What’s relevant to us is that this “wiring” of the human brain has been constantly mutating in the past. It is dramatically changing at this moment --with the advent of digital platforms and instant RTC (Real Time Communicants)-- that include unlimited data but also voice and video, and will change even more with the arrival of the IoT (Internet Of Things), whose aim is to interconnect the machines we currently use, and let them make decisions on their own through AI (Artificial Intelligence). The robots that are already in charge of “manufacturing” cars and manning call centers, among many other tasks, are just a sample of what humanity will have to face in the oncoming decade.

The young human brain –babies, toddlers, kids—is much better prepared to ‘understand’ and react to these challenges, while grown-ups must try to adapt themselves to the reality. This implies a migration from former beliefs. This sociodemographic sector will keep watching linear video content and therefore will not vanish as audience, but to storytellers it presents a problem: its understanding capabilities will be lower than what youngsters require from content at the same time. As a consequence, there will be further fragmentation of the audience, which is bad news for massive media that require a large number of eyeballs to maintain advertisers satisfied.

This has an international angle, that worldwide television has been already facing in the past five years. It happened when the U.S. producers halted the production of shows such as *CSI: Las Vegas* while this type of programming was still very much appreciated in Europe. The lack of suitable replacements from Hollywood boosted local production at several Western, Central and Eastern European countries and opened more

Streaming vs. Linear TV

Teens and young adults are watching online much of their television, including via gaming consoles



Source: Nielsen Total Audience Report

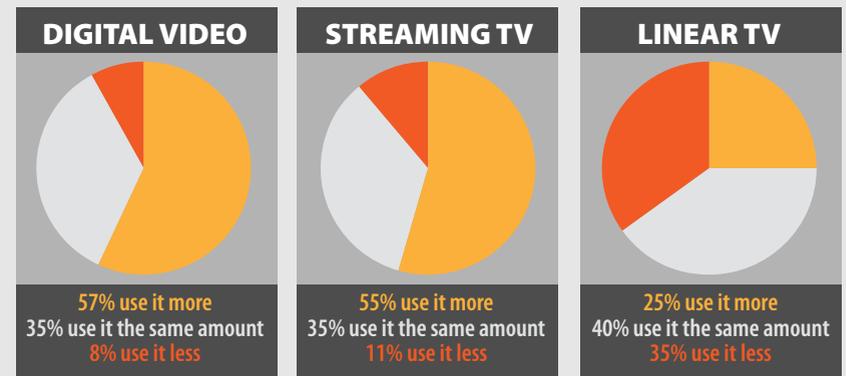
widely the door to now thriving industries, such as the Turkish, as well as increasing opportunities for content from India and South Korea, among other Asian nations.

The Latin American producers have also experienced a decline in the demand of their drama offerings, generically known as “telenovelas”. But, this has happened due to the opposite circumstance: their stories, often based on variations of the controversy between rich and poor, were too frequently focused on a poor girl that falls in love with a rich young man who is poised to marry another woman, who obviously acts against the newcomer. Daughters and sons born out of wedlock have been another source of inspiration; the stories have been intense in feelings and efficient during several years, until the Central and Eastern European audiences grew out of these conflicts and started to require more complex plots with issues such as politics, lobbying and corruption. The Latin American top telenovela producers have reacted to this, but a large part of their new outcome appears focused on conflicts that do not travel well across the Atlantic Ocean.

The Western European producers have had their own roadblocks to deal with regarding Latin America. Although there remains a minority of Latin American-born people of European ascent, it cannot sustain most of the programming produced in the Old World, except through specific cable networks that appeal to them. Spain, France, Italy, Japan, China and Germany are some of the nations that are sources of content for these outlets, but not through broadcast channels or high-audience pay TV channels. So, How did Turkey achieve this? Aside from the fact that Turkish output relies on **traditional values** based on **respect** (we will later discuss this in detail), it also weighs in that the producers from other nations appear adamantly opposed to adapt their content to the pace and formats the Latin American broadcasters found more palatable to their audiences. For instance, 90-minute episodes of Turkish dramas are sometimes turned into half-hour and hour episodes, with entire scenes being deleted in order to adapt the story to what is supposed to be local taste.

The U.S. Hispanic market is also experiencing a transition that has been hard to understand for some of its players. Leading broadcaster

Change in Teen Usage of Select Media 2016-17



Source: eMarketer

Univision has traditionally relied on telenovelas produced by Mexican powerhouse Televisa (and, for many years, by Grupo Cisneros; this is no longer so), while its major opponent Telemundo –now part of the Comcast NBCUniversal group—sought product from other Latin American sources and commissioned programming from independent producers within the region. In the recent past, it has been found that drama programs related to drug trafficking and migration situations have arisen the interest of audiences and eroded Univision’s legacy ratings leadership, but second- and third generation *Latinos* have been migrating to Anglo-Saxon programming and speak English language. This has affected the Hispanic broadcast advertising market and projects of Hispanic-oriented social media ventures, such as The Fusion Media Group, currently a division that Univision has been trying to sell after buying out Disney, its former partner.

Cord Cutters, Cord Nevers

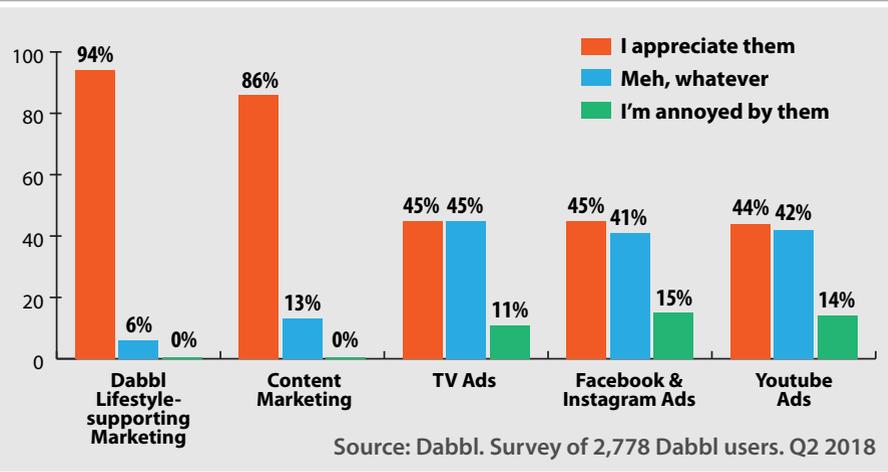
As seen earlier, after reaching a peak in most countries about two to three years ago, the linear pay TV industry (cable and satellite) has started to report flat or slightly decreasing subscriber bases, attributing most of this decline to the emergence of:

- a) the so-called **cord cutters**, people who have ended a subscription to cable or satellite-delivered prepackaged programming, and,
- b) **cord nevers**, those who have never been subscribers.

The official reason for most of these “cutters” or “nevers” is price. In the United States, a full subscription to cable, including sports and premium channels, may cost up to some 160 dollars per month; in Latin America, where purchasing power is significantly lower, it ranges in the order of up to sixty dollars per month, taxes included. This compares to Netflix’s price, ranging from nine to twelve dollars per month, plus the eventual tax many countries apply now to services delivered over the Internet from other nations.

The linear TV industry has traditionally argued that it cannot provide “skinny bundles”, with less channels, because this would endanger the existence of ‘many’ channels that would not be able to exist under the ‘a la carte’ system. On the other hand, as seen earlier, most people watch no more than seven channels. And, about thirty channels account for roughly 80% of the audience ratings, at least in Latin America (see chart

How Millennial women feel about brands via different marketing methods



on page 6). This channel selection would be difficult to achieve because most commercial pay TV networks package several channels into a “bundle” and refuse to sell them separately.

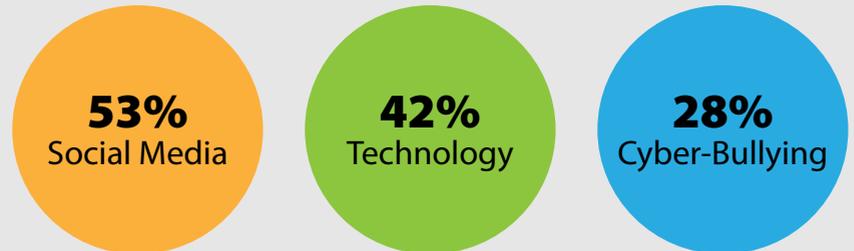
The emergence of Netflix and other similar services –Amazon Prime Video, Hulu, Telefonica’s Movistar, America Movil’s Claro and hundreds of ‘independents’— has allowed “cutters” and “nevers” to find an alternate programming source at a fraction of what they paid for regular cable and satellite access. But, Parrot Analytics statistics show that about half the population in the United States reports refusing to sign up for video streaming services: in the United Kingdom, about 45% share this opinion; In Brazil it’s 43%. By contrast, Italy marks one of the lowest levels of refusal: 18%.

The LTV industry argues that, for a household, subscribing to several streaming services plus a convenient broadband connection will cost very close to what a regular prepackaged bundle would demand.

So, it looks like there’s a cap on migration of linear TV audiences to OTT pay services. But, there’s another angle to this audience erosion: videogames. And it happens because videogames are constantly increasing their appeal to young (and not so young) consumers, with exactly the same tools applied by linear television: story, characters and visual resources. Plus, something linear TV lacks for the time being: player intervention. And, last but not least, videogame producers have the chance to improve their story and visuals constantly, while a TV piece, once finished and exhibited, is difficult to retool.

Success is not guaranteed. Facebook launched its VOD service Facebook Watch, available in the U.S. and now expanding worldwide, with titles such as *Returning The Favor*, *Humans of New York* and *Strangers* that are not available on linear media. Keshet Media Group has launched in Israel its app *mako*, for viewers up to 35 years old –Millennials. It obtains about one million views per day on 22 sites and content channels, including desktop and mobile. But, other media groups have had bad experiences: French Vivendi Contents launched Studio+, a short content app that included 30 original 10 x 10’ productions (at a €1 million cost each) focused on Millennials. It reached five million paying subscribers in Europe and Latin America but has been recently cancelled.

The top three things teens think will have the biggest impact on their generation are all digital



Source: Awesomeness TV

Videogames

Videogame players (often known as **gamers**, routinely engage online with people –presumable of the same age— from other countries as easily as they could deal with somebody living at the same block. Since videogames are distributed on a worldwide (or at least pan regional) basis, a boy or girl playing from Argentina will easily connect with somebody from Brazil or Mexico and team up or compete using the same software. For linear television, it is impossible to deliver this; SVOD streaming achieves sort of this with the global launching on Netflix, but lacks its synchronicity, which is of essence for real time playing.

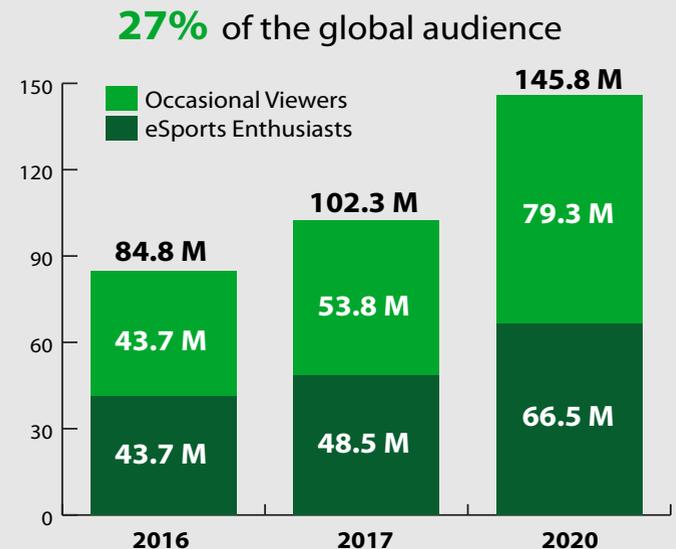
As a result, videogame players are extremely passionate about the software producers: many teenagers are able to identify the top game companies —there are about seven— and distinguish them from the “independents”, pretty much alike what happens in the movie industry, and probably not a coincidence.

They are also fast to evaluate the “quality” attributed to each of the new releases by the major companies, and have an opinion about the commercial strategy exerted by them, which usually includes paid upgrades when the game is doing fine among the gamers, free upgrades when the producer senses that the title is losing ground to competition. The business has also its **classics**, contents released maybe twenty years ago that still are the foundation for international tournaments among experienced players, and sequels. There is also the concept of **cinematic** content, the part of the videogame that cannot be changed by the player. Gamers may follow “paths” allowed by the designer, but are unable to change the fundamental concepts of the play.

Video gamers appreciate more playing on a computer than through a game console: they find the PC games less expensive to buy and maintain (upgrades are considered by them to be a major financial source for the producers) and have improved a lot since the initial titles in the Nineties, which are called “pixel” games because of their lower screen resolution.

The pan regional networks are not indifferent regarding this market. For instance, Turner has launched its SVOD platform Gloud in Argentina and Chile, to be

eSports audience in The Americas (2016, 2017, 2020)



Source: NewZoo TV

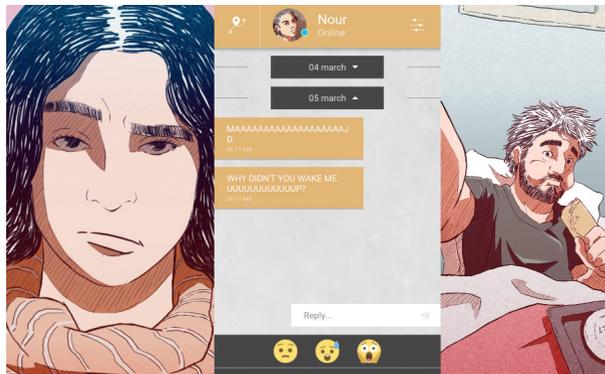
followed by Brazil and Mexico. It allows playing more than 50 videogames on a PC or Mac without having a console or downloading them; subscription prices range in the order of \$13/month. Others will probably follow in the near future.

eSports

eSports are another reason for both eyeballs and advertising migrating to digital. Their advantage to advertisers is that there are plenty of sponsorship opportunities, in both North America – as a percentage of global billings— and China –in terms of awareness: 433 million people are interested in them, according to a New Zoo report. The pan-regional programming networks have also noticed this, with Turner owning and operating *eLeague* and Disney becoming the controlling partner at BAMTech, which operates digital streams for a variety of sports as well as *League Of Legends*. The eSports advantage is that they show a high engagement ratio, thus allowing ancillary sources of revenue, such as merchandising and live events.



SKAM (NRK, Norway): Norwegian public television development *Skam (Shame)* has been one of the most intriguing examples of the so-called “transmedia” content, where viewers participate, through social media, in the plot of a television series



Enterre Moi, Mon Amour (ARTE, France): is an interactive fiction on smartphone about the intense journey through Europe of a young Syrian migrant, following the thread of her instant messenger.

Sources of information

User cross-border groups are constantly interconnected and share opinion. This is the reason why social networks are their main source of information, not only about videogames but also regarding streaming television content made available by Netflix and the other SVOD players. According to Parrot Analytics, about 42% of the audience in the U.S. discovers “online television” content through “word of mouth” and 22% by “online browsing” such as ‘articles, news at blogs’. The high-impact Netflix home screen recommendation algorithm comes in third, with about 17% of findings, a bit more than advertising such as banners or video trailers.

Regarding “offline television”, “word of mouth” increases slightly to 45%; TV commercials are the source for a little more than 30% of discoveries. Outdoor advertisement such as billboards, a classical resource for Hollywood, amounts to 10% of findings and is outscored by TV listings, which account for about 19%.

Online vs. Offline

The Nielsen Total Audience Report asserts that 'Linear still dominates U.S. media landscape' but acknowledges a higher growth rate for online watching time, even among U.S. young adults (18+): this demographic group is quoted as spending over eleven hours per day connected to linear and digital media, and 'almost six hours a day with video alone'. Nine out of ten adults are reported connecting to digital platforms. TV-connected device daily usage has increased during 1Q18 by five minutes, while digital platforms were being watched 13 minutes more than during 4Q17.

While "Live and Time-Shifted TV" reaches 88% of the population and "Internet on a Computer" is estimated at 60%. The report acknowledges that 79% of the population connects to Web applications through their smartphone and 47% do it on a tablet. This, compared to 60% who connect to the Web through a desktop computer. 35% have Internet-connected devices and 15% play regularly on game consoles. And, this data is for Adults 18+, which partly covers Millennials but falls short of Generation Z.



The War of the Worlds: Orson Welles' radio transmission of *The War of the Worlds* was the first acknowledged case of fake news, and its effect has been enough documented

So, the challenge here is to produce video content that will travel equally (or at least comparatively) well both on offline and online television. The idea that Millennials will start behaving as Baby Boomers when they settle down for a steady job, work from 9 to 5 and want to enjoy a few hours of "companion television" (the term applied by Bruno Patino to low-budget entertainment programming), in addition to exposure to "Peak television" (high budgeted content), has been losing steam in the past couple of years. This expectation is affected by the migration of advertising from offline to online media, despite some setbacks at flagship social media networks and friction arising from the inadequate placing of online ads at websites not conveying the corporate image sought by the advertiser, as already seen.

The major question is: Is it possible to produce content that will be appreciated both offline and online? So far, we have witnessed a few overwhelming examples (*Game Of Thrones*, *Breaking Bad*, *The Walking Dead*) and combined efforts where online appears as a complement of the online effort, and vice versa. Norwegian public television development *Skam* (Shame) has been one of the most intriguing examples of the so-called "transmedia" content, where viewers participate, through social media, in the plot of a television series. In France, ARTE has produced *L'Oeil de Ninon*, about surveillance cameras displayed in a small city and its effects on the inhabitants,

Storytelling for Millennials, Gen Z... and more

and *Enterre Moi, Mon Amour* about a Syrian emigrant woman in Europe whose husband remains at their homeland and guides her (with the viewers' help) through diverse incidents.

Russia has watched another interesting transmedia experience: TV-3 produced *Gogol: Origins*, available both as a feature horror movie (also released in Spain, Germany, Austria and Cyprus) and an 8-episode thriller TV series premiered at Mipcom 2017. The content is based on *Evenings On a Farm Near Dikanka*, a book written by Nikolai Gogol in 1831 with short stories based on Ukranian fairy tales.

Beyond content made available for different media, Transmedia experts are currently exploring extensions, among them **Virtual Reality** and **Augmented Reality**, as a path towards "more immersive" experiences for viewers. They will probably succeed with niche groups, but many people --as it has happened with 3D television and movies-- don't feel comfortable wearing head devices (no matter if they are made of cardboard or plastic, their price or design) in order to be able to watch with more degrees of liberty. Some individuals experiencing VR have reported dizziness and other disturbances. For the time being, it seems this will not become an expansive trend, unless breakthrough technical improvements are obtained.

Virtual Reality and Augmented Reality, however, will be probably applied to derivate and business applications, as it has happened with UHD 4K and 8K television, still nascent as a revenue source regarding household television sets but widely applied for program production and image enhancing.

In search of the third dimension

In his book *The Visual Story*, Bruce Block repeatedly warns about the television screen being flat. Then, he offers advice about several ways to produce an illusion of depth in the viewer. The movie industry and the television set manufacturers have devoted numerous efforts to create this effect, requiring usually that the viewer uses special glasses. The Warner Bros Studios tour in Los Angeles tour distributes them for its visitors to better enjoy being attacked by dinosaurs, experiencing a flood or being part of a freeway shootout.



Game Of Thrones (HBO): is an overwhelming example of content that can be appreciated both offline and online, mostly combining efforts where online streams and mobile games are a complement to the offline effort, and vice versa.

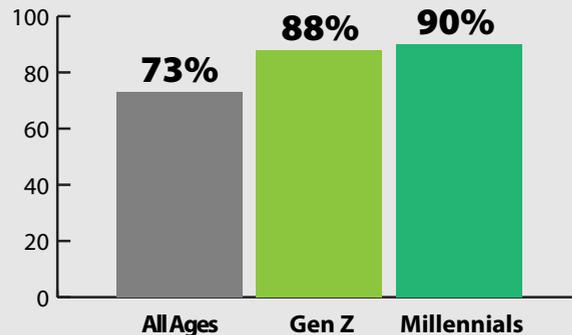


Make Up or Break Up: Facebook's *Make Up or Break Up* is a format where the audience decides if a couple should stay together or break up

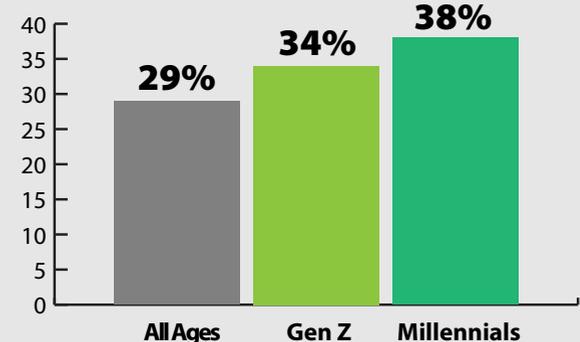
Netscape founder James H. Clark is credited with having suggested in 1994 that he perceived, at that time, that the mouse provides a sort of third dimension to the flat computer screen. The experience we have so far is that compelling stories don't need visual effects. We have also learned that computer experience has allowed Millennials and Gen Z's to detect when a movie or a TV show carry sloppy special effects. When this happens—as with a bad translation of a text you know from its original language—it is very distracting. And storytellers don't want their viewers to be distracted from the plot.

Audiences that have ever binge-watched / binge weekly

Consumers who have binge-watched TV shows



Percentage of weekly binge watchers



Source: Deloitte Digital Democracy Survey, Eleventh Edition

Social Media programming

The social networks have embraced, too, the production of content as a way to retain viewers and deliver them and their related data to advertisers. YouTube, Facebook, Snapchat, Instagram and Twitter, among many others, are now looking after ways to increase the connection time of their millions of followers, in order to improve monetization. This, in an universe where their core audiences sign in and out several times a day, usually for short time periods. YouTube appears capable of keeping them connected for more time and is the closest to be linear television's perfect headache.

Among the shows delivering through social media an experience similar to LTV's goal, Facebook's *Make Up or Break Up* is a format where the audience decides if a couple should stay together or break up; Brazilian Formata Produções' *Entubados* is a Big-Brother-styled reality where a group of YouTubers is confined at a house during two days per week. Snapchat's *Good Luck America*, hosted by former CNN reporter Peter Hanby, has produced about 500 episodes dealing with politicians and other public personalities. The platform reports an average of 191 million users per day, seeks highly visual person-to-person communication with the viewer and is focused on mobile phones.

Storytelling for Millennials, Gen Z... and more

As already seen, many successful LTV programs, as well as artists and personalities, including some journalists, have been able to build up follower bases on social media and sustain them with news, gossip, opinion and pictures about their beyond-screen activities. But, this has proven to be not enough for the social networks, especially after discovering that Millennials and Gen Z tend to believe more in the speeches and imagery delivered at social media than in what appears on linear television.

This has given birth to the so-called **Influencers**, some of whom are able to make impressive amounts of money by pitching products or services during the time of their recorded appearances on YouTube. It is of essence that they appear to be honest, in the sense of “free of deceit”; their major application is to advise their followers on issues that these viewers are afraid –or reluctant—to ask their family and surrounding people.

Teenagers need this type of knowledge when meeting people of the opposite sex or elders, since **shame** is one of the top fears at this age group –and others, too. Shame, being the opposite of **appreciation**, (which leads to **fame** and **recognition**) is one of the major drivers and the explanation to sometimes bizarre behavior and, if we follow Belgian TV character *Professor T.*, even crime and home violence.

Some television producers have been trying to lure YouTube celebrities to star television shows. So far, online followers appear to consider this move like betrayal and there are no available reports of a successful direct migration. However, some social media show producers have started to work on linear television programming with promising results.

Despite common belief, there’s no proven direct correlation between linear television ratings and social media activity. While certain show business personalities –as well as journalists, politicians and other people under heavy mass media exposure— have millions of followers and activity bursts when they headline the news, surveys show also the existence of many television shows that exhibit large social media follower bases but low screen ratings. Certain producers argue that television measuring ratings are at fault here, but additional research is required. After all, the social

Songwriting genealogy

- **Geographical:** evokes landscapes, birthplaces, migration, nostalgia
- **About people:** describes characters, family and friends, outstanding people
- **Social issues:** poverty, inequality, worker strikes, politics
- **Sexual:** relationships, mating, breakups, loneliness

Storywriting Genealogy

- **Humans vs. Nature** (Epic, Sagas)
- All humans should be **good** (Religion)
- There are **good** and **bad** people
- **Good** people do **bad** things
- **Bad** people do **good** things

Popular songs have evolved along times according to a remarkable pattern. Written stories have had a pattern of their own, too. Millennials and Gen Z readers and viewers require now more complex plots, characters with features that defy easy labeling. (Source: Private Advisor)

media algorithms work only with “active” followers (those who have liked, retweeted recent messages, etc.) and not the entire base. This strongly slashes the number of people who actually receive a message from the person or entity they are supposedly following.

Keys to Storytelling

The challenge faced by linear programming television is:

How do I regain at least part of those who have migrated to video streaming services (such as Netflix, Amazon Prime Video, Hulu), videogames or, even worse, have never watched “television channels” instead of “programs”?

Another focusing strategy would be: Is it possible to roll out content that will be well received by linear television watchers and the online crowd?

So far, at least two different strategies have been developed:

1. Adapting the original content (for instance, a television series) to online streaming, by post-production processing and other resources that adapt the original format –say, 24 to 48 minutes per episode, although this is no longer valid for premium pay TV— to short segments. To be successful, this requires specific writing that will allow this practice without impairing the intended message.
2. Start from different versions of a certain content obtained after defining the core story. While this will probably be more efficient than adaptation regarding audience reaction on each of the media chosen, it might produce friction among those that compare the content by watching it both online and on linear television. The Gen Z crowd remembers and detects visual details that are ignored by Millennials and older people.

What producers usually choose is to roll out a basic television version and obtain feedbacks from online viewers through social networks, publicity or advertising. But this does not solve the problem created by those that refuse to watch LTV. The “multimedia” (or “transmedia”) approach tries to reach online viewers through the adaptation of the content to the patterns accepted by them, which for the time being is expensive and not always successful.

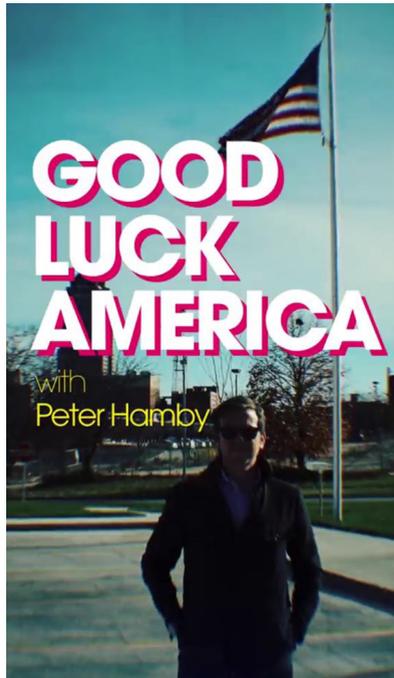
All in all, a trend emerges for video programming: greater participation by the viewer and the chance to offer some “degrees of liberty”, a sort of balance between the storyteller’s creative work of the storyteller and offering the viewers the opportunity to shape the results to his or her preferences, along “paths” maybe similar to what video games let choose. This is what has been defined as television **gamefication**.



Entubados: Brazilian Formata Produções' Entubados is a Big-Brother-styled reality where a group of YouTubers is confined at a house during two days per week

Netflix

Netflix is a basic example of **augmented choice**. Born out of the initial VHS, then DVD market, it foresaw an opportunity that was rejected by Blockbuster, too much influenced by the idea of making money on late-return fees and other legacy concepts related to the physical world.



Good Luck America (Snapchat): news stream, hosted by former CNN reporter Peter Hanby, has produced about 500 episodes dealing with politicians, with a reported audience of up to 100 million people

Another legacy chance followed: content producers, including the Hollywood studios, were signing limited time contracts with the pay TV programming distributors —often belonging to the same group— and this practice made available this content to third parties after one to two years. This sounded reasonable when you depended on the syndication market, with “independent” U.S. stations that air reruns of successful programming a couple of years after this content has been aired by the major networks, ABC, CBS, Fox and NBC. The U.S. “indies” were later acquired by broadcast groups that currently purchase these rights mostly through private deals. But Netflix found it could obtain temporary and International rights to Hollywood movies and television series at a convenient price.

This allowed it to offer a “Virtual post-DVD” niche inventory comprised by full past seasons of successful shows, movies already exploited and alternative content no longer available on linear television. Some premium and basic channel providers —HBO being the most noticeable example— refused to allow Netflix access to their inventory, others hesitated. The Netflix success called soon for reaction by the original developers, with ventures such as Hulu or Crackle. And pushed Netflix into original production.

While Netflix could no longer insert itself between the Pay Per View and Premium Pay Channel stages of the food chain, the fact that it had access to full seasons and its convenient on-screen transition from an episode to the following one fueled the so-called “binge viewing” practice. Its subscribers started watching episodes back-to-back, a practice not so alluring on linear pay TV —which is now emulating it— and requiring physical movement, including changing disks, with DVDs.

It also changed the art of storytelling. Additional “arcs”, secondary plots across episodes and seasons, were added to what was customary. Characters became more complex and obscure, additional links were added to the traditional “cliffhanger” expected to move a person to watch the next episode of a series. This resulted in plots that might sustain interest along several hours and recurring characters, appearing at only some episodes of a season but adding diversity.

It also increased costs and applied pressure on story writing. As a relief, seasons of many new series –such as *Mr.Robot*-- have been slashed from the traditional twenty-two or so to eight to ten. The concept of “season” became closer to what in Britain is called “a series” –in the case of BBC’s *Sherlock*, three 90-minute episodes every two years— and is also usual in Europe. Yet, the basic principles of storytelling remain unsurprisingly stable: **Fear** is the most important keyword, followed by other human reactions: **Ambition, Envy, Lust, Fantasy, Love** and **Shame**. Nothing has essentially changed since Shakespeare’s *Romeo and Juliet*, but try to imagine the Verona lovers as Gen Z characters surrounded by Millennials. Yes, the *mise en scene* would be different.

Fear

Fear is maybe the major driver behind human behavior; Millennials and Gen Z’s are no exception to the rule. The difference is in how they suffer and eventually manage it.

Millennials and especially Gen Z’s are a crowd with a “flat” approach to reality. They have access to a much wider landscape, in term of possibilities, than their predecessors, Gen X and Baby Boomers. The older generations had a sort of fixed destiny in mind: becoming a lawyer, a doctor, an engineer, a bank clerk. Nowadays, young adults and teenagers foresee a large variety of applications to their presumable talent. And many of them will try different opportunities hoping they will find which one suits them best. Changing from one path to another does not afflict them. Fear comes in three basic versions and is freely available to all of us: there is **Past Fear**, related to things that happened in earlier life (poverty, lack of mother or father, domestic violence, etc.) and fixed in the unconscious, but ready to be released through social media. That’s why there are so many questionable tweets and so many Facebook pictures that unlock a conflict.

Then, you have **Present Fear**, a reaction to the current scenario, its limitations and a feeling of displeasure concerning people, objects and ideas that surround the individual. Present Fear has often economic and political significance, and is a trigger for violence. Kids and teenagers find it pleasant to play video games that are considered violent and despicable by grown-ups, but it might be a way to discharge their internal turmoil. According to MarketWatch, videogame *Grand Theft Auto V(GTA)* ‘has brought in US\$ 6 billion, more than every single media title in history’ (including movie blockbusters such as *Avatar*, *Star Wars* and *Gone With The Wind*) and ‘continues to sell’, having reached already the 90 million units mark, second only to the series of *Mario* games.



Stranger Things (Netflix): Appellation to nostalgia, with references to the Eighties that are of interest to grown-ups, *Stranger Things* (Netflix) also portrayals the adventures by kids hiding their activities from their parents, a common trait among current Gen Z’s.

GTA started as a 2D game in 1997, then turned to 3D and became immersive; in 2017 it has been the sixth best-selling game in the US. According to this source, the closest competitor in sales to *GTA* is 'First-person shooting series *Call Of Duty*, with two titles: *Black Ops* and *Modern Warfare 3*', which so far have sold 24.2 million and 26.5 million units.

Future Fear is about all that may happen during the rest of our lives: illness, poverty, violence and several other unpleasant alternatives, combined with some happy possibilities. But, to teenagers, it features an additional hurdle: how to relate to other people. Real Time Communications, the combination of voice, image and data messages sent and received instantly no matter the distance, are no textbook regarding how to relate to the boy or girl in front of you. And, books such as Dale Carnegie's *How to Gain Friends and Influence People*, as hilariously demonstrated at the *Young Sheldon* series, are no longer effective. So, many youngsters try to complement digital interconnection with personal proximity to acquaintances of either sex. But, these encounters do not change their beliefs, they are more a way to learn how other people behave. To moviemakers and television showrunners, it's the largest boon on Earth.

Shame

While present in most people to a larger or lesser degree, shame has not received so far the attention it deserves as an audience resource. Of course, it is easy to remember British series *Shameless* (2004-2013) on Channel 4, and its U.S. remake premiered by Showtime in 2013 and running now on its ninth season. Described as comedy-drama, it has been possible because its main characters are the expression of too many people that surround our daily life, maybe in a subdued version.

But, there's much more to expose about shame, because shame causes humiliation and this leads to violence. According to writings by Donald L. Nathanson (*Shame and Pride*, 1994), one of the primitive responses to shame is to 'attack other person'. One of the cases when this is applied

Cicero's Formula for Persuasive Talk

Rome 10 - 43 B.C.

INSTRUCT

SATISFY

MOTIVATE

- **Narrow Down Your Key Message**
- **Organize your points for Maximum Impact, be Persuasive**
- **Decide how you will present each point**
- **Appeal to the audience's ethics or morals**
- **Appeal to the audience's emotions**

More than 2000 years ago, brilliant Roman speaker Cicero defined the elements of a speech to be memorable. The essence has remained unchanged: printed stories, radio, television and now digital media remain respecting this listing.

is when 'the interpersonal relationship that existed previously has been critically reduced in value and importance due to the actions of the other'. That is, cases of family violence, an issue of great potential to storytelling, if properly managed. Dr. Nathanson offers other eight basic affects: interest-excitement, enjoyment-joy, surprise-startle, fear-terror, distress-anguish, anger-rage, ugly smell and disgust. All of them are basic ingredients for any storyteller's recipe.

Other Personality Traits

The clean-cut hero of the legacy Western and Crime movies no longer works. Teenagers and young adults require today characters from whom they may learn things that will be useful in the future. A Maxwell Smart-type detective, with too many flaws, remains hilarious but became unpractical.

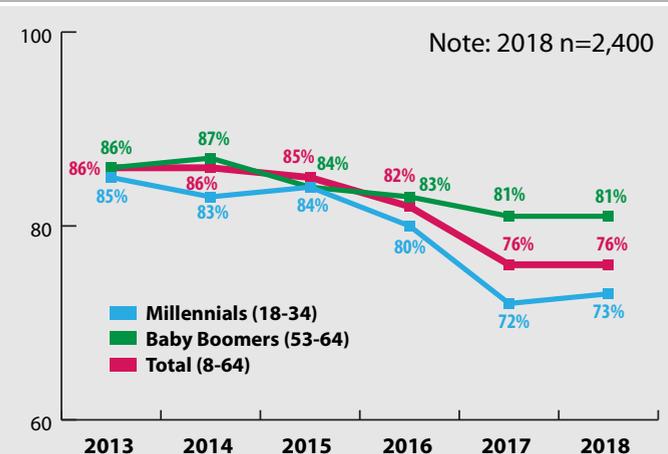
What seems at this time to be attractive to Millennials are heroic personalities with a required degree of shortcomings. This started with *The Sopranos* and *Mad Men*, among other titles, and has been well described by Brett Martin in his book *Difficult Men*. Jason Mittel's book *Complex TV* also delves in this issue, with examples from different television eras.

In Belgian series *Professor T.* (Skyline Entertainment), the leading character – professor Jasper Teerlink-- is an extremely intelligent criminalist who serves as a professor at Antwerp University. He mentions Dr. Nathanson's theory about shame as a source of criminality at one of the early episodes of this series. But, dealing with him is a torture for everybody, from his mother –quite a piece of work, too— to the police squad he advises and the University dean that has to protect him against himself. The format has been applied in Germany and other countries.

In Scandinavian series *The Bridge* (2011-2018), Danish inspector Martin Rohde and Swedish Saga Norén are equally different from being the clean-cut police officers portrayed in 1977 by Telly Savalas in *Kojak*, though *Kojak's* sentimental life hinted the friction now commonplace. The same may be said about *CSI: Las Vegas* and leading character Gil Grissom's relationship with Sara Sidle, but what could be disturbing in 2000 will not ruffle any feather nowadays. In Finnish series *Sorjonen*

Pay TV Penetration among US Internet Households, by Generation, 2013-2018

% of respondents in each group



Source: Magid, 'Video, Video Platforms, and other Digital Highlights: Media Consumption Survey 2018', June 22, 2018

(*Border Town*), leading character inspector Kari Sorjonen and his wife have a complicated sentimental past and present life with other people. Millennials don't mind.

The same concept applies, in many countries --again, not those with traditional culture traits--, to LGBT stories. Teenagers living there are exposed to so many stories of this type that they may even make fun (satire is one of their preferred weapons) of those who appear shocked. It's not that they don't notice it, it's that they don't care. By stark contrast, deeply religious nations remain where social customs forbid references to these issues. As a result, dealing with these aspects will reduce the worldwide appeal of the finished product. This should be taken into account prior to shooting.

Language

There was a time when British actors were dubbed when performing at U.S. shows. Well, no more: at present, it is internationally accepted to feature up to three languages in a single program, sometimes translating through subtitles, in other cases just letting them happen.

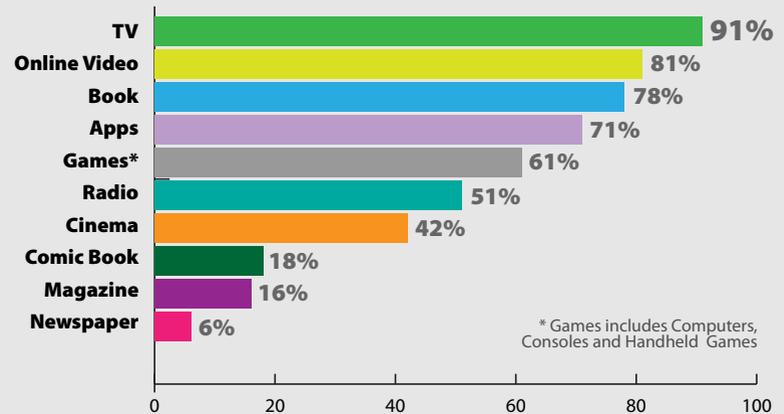
This has been a help for co-productions between border or close countries, as in Scandinavia, and Brazil (Portuguese language), Argentina and Uruguay (Spanish), as seen at HBO Latin America's *El Hipnotizador* (*The Hypnotizer*), shot in Montevideo City.

In Latin America, pay television channels face a hurdle: while there is a larger audience for dubbed programming, the higher-income population sought by advertisers is strongly in favor of original language plus subtitles. Since there is no common standard established, it may happen that a dubbed program also features the subtitles, usually with a different version of what is being heard on screen, to the confusion and often anger of viewers.

On the other hand, local dubbing in Chile has been the reason for the major broadcast success of Turkish drama titles such as *Fatmagul*. Dubbing it with another Spanish language accent (Mexican, Colombian, the so-called "neutral") would have been not so well accepted. Plus, while there are several dubbing houses in the region, the audience tends to remember the voices of those who dub famous characters – *The*

TV: N° 1 at media usage

% use in the past month



Source: Turner New Generations 2018 - Australia. Media Usage Survey - Weighted Sample. Kids (n=1,281)

Simpson's Lisa is one of them—and it results distractive when a voice that brings to mind a certain screen personality is applied to a different one.

Social media action applied to television programming

Considering the data we have seen about the huge influence of “word of mouth” in the search of content by Millennials and Gen Z potential watchers, it is shocking that a large number of linear television titles are not backed by adequate social media action. In this case we are not only speaking about developing trailers for YouTube and Facebook or opening character accounts that complement the plot, a practice among active community managers. The point is that, nowadays, the way the story is told, needs to provide social media influx to any program being exhibited on broadcast and pay television, in order to feed the message exchange among existing and potential viewers.

This should be started from the moment a TV content is commissioned, and may become gruesome if friction happens with the leading characters. For instance, a well-known actor or actress may just hate social networks, or have a social media life too turbulent for the needs of this particular project. Problems also arise when an artist has no account but there are several copycats that capture social media traffic and influence it.

These considerations are not strong enough to influence the casting, but it appears mandatory to keep the issue in mind and secure social media accounts that may relate the online crowd to viewership. Internet data shows that social media activity is not directly related to television ratings, but it may well help increase the audience for programming aiming at a special socio-demographic category and hopefully turn what could be lukewarm ratings into something that can be shown as a success. After all, the first thing foreign buyers ask when offered a new or unknown title, is “How did it fare in your home country?”.

Launching a linear TV show without full social media coverage for both content and actors related to the script will deprive it of needed world of mouth and publicity. A script that allows social media action is becoming increasingly necessary to attract Millennials and Gen Z audiences.



The Walking Dead (AMC/Fox): Trailer may have pushed an internal button regarding globalization: the rules and order imposed by society have disappeared, everything is up for grabs and what looks like zombies is just a group of people that obeys certain rules and behavior.

Appendix

Case studies

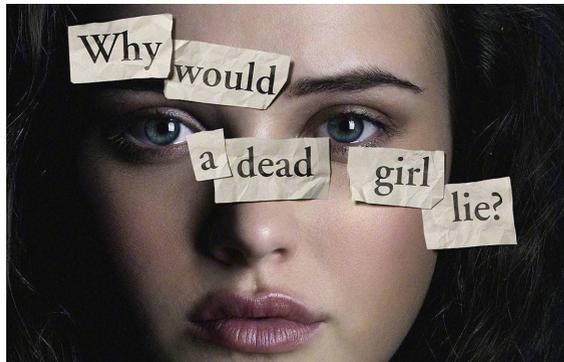
Here are some successful cases of storytelling in the past years –not necessarily concerning Millennials, but providing clues about what moves audiences to like these contents-- and some of the reasons for them to have been outstanding.

Game Of Thrones (HBO)

An epic world where various clans try to seize ground controlled by their enemies and the appearance monsters and mythical characters unleashes a deluge of issues related to life, power, love and war where each viewer chooses whatever his more relevant to his or her particular feelings. The fact that any character may die at any moment ties the audience to continue following the plot and wait impatiently for the next season to come. The outstanding production values make this possible.



The Bridge (SVT-DR): Swedish/Danish drama series (S1-4, 2011-2018). At S1 a mysterious killer commits murders difficult to relate, beams video streams for the police to watch an try to find clues to his motivation and action. The international bridge between Copenhagen (Denmark) and Malmo (Sweden) serves as setting.



13 Reasons Why (Netflix): The plot covers controversial issues, such as a teenager suicide, bullying and other problems that strongly attract teenager suicide are some of the keys to understand Netflix's 13 Reasons Why success

Please like me (Netflix)

This series follows a teenager who discovers he is gay after being left behind by his girlfriend. The viewer feels like being part of the main character's group of friends: the entire season can be easily watched in a single session (binge-viewing), includes music scenes and discusses issues related to LGBT people and current social topics.

Stranger Things (Netflix)

Appellation to nostalgia, with references to the Eighties that are of interest to grown-ups, but also the portrayal of adventures by kids hiding their activities from their parents, a common trait among current Gen Z's. 14-year old Millie Bobby Brown turned into a sort of example to follow by teenagers and kids, enjoying strong exposure on social networks, with Instagram profiles of the main characters.

***The Sopranos* (HBO)**

A series that helped start a new era in storytelling (“Difficult Men”) when the viewer starts discovering some good deeds and frailty in whom otherwise would be perfect villain. This ‘bad guy doing good things’ duality has been also in part responsible for the success of *Breaking Bad*, letting the viewer face a dilemma that fosters audience ratings: “Is it right to accept bad actions?”

***The Walking Dead* (AMC/Fox)**

A theory regarding horror movies suggests that they are extremely successful because they appeal to the internal fear any human being carries inside. According to this, *Frankenstein* became memorable because, at that time, humanity was afraid of mechanization. *The Walking Dead* may have pushed an internal button regarding globalization: the rules and order imposed by society have disappeared, everything is up for grabs and what looks like zombies is just a group of people that obeys certain rules and behavior. Unlike other zombie movies, the “walkers” are not the major enemy faced by the series’ main characters.

***This is us!* (NBC)**

A series focused on cultural diversity among people born the same day, an issue sought and discussed by Gen Z viewers. The plot starts when a couple loses at labor one of their triplets after being born, decides to adopt an Afro American baby born the same day. It then follows how people born on the same day behave in different ways. While in the U.S. there is strong television production aiming at its Black population, the interaction obtained at this plot has allowed it to call the attention of a wide international audience.

***13 Reasons Why* (Netflix)**

In addition to being based on a best seller, the plot covers controversial issues, such as a teenager suicide, bullying and other problems that strongly attract teenager attention. The story starts at the end, then unwinds the mysteries about the influence of each character in the tragic end; its structure promotes binge watching because the viewer feels the need to know more about the story.



Professor T. (Skyline Entertainment):
Personality traits like shame have become some of the major drivers and the explanation to sometimes bizarre behavior and, if we follow Belgian TV character Professor T., even crime and home violence can be.

About the author

Prensario

This report has been prepared for Reed Midem by Editorial Prensario SRL, publisher of trade magazines covering television, music, broadband and Information Technologies.

Prensario International issues are published in Spanish, English and/or Portuguese languages, according to the country where related conventions are held.

Founded in 1973 and based in Buenos Aires, Argentina, Prensario also operates four websites covering these fields and the weekly email-delivered newsletter Prensario International Online, sent to some 10.500 industry executives and professionals around the world. Private Advisor, a monthly newsletter in English language with statistics and commentary about the world pay TV markets, is distributed among top industry executives.

During many of the conventions and conferences Prensario International attends and covers in Latin America, the United States, Europe and Asia, daily reports are published and distributed over the Internet to a select database.

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