Media Branding 3.0: From Media Brands to Branded Entertainment and Information

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Abstract
This piece examines recent changes and emerging trends in the media industry, their implications for branding, and specific research ideas that address these changes in the context of media branding. An overview of the characteristics and challenges facing today's media brands is introduced, followed by an analysis of recent changes and how they might re-shape the parameters of media branding strategies. Next, a list of factors that are expected to affect media branding practices into the future and potential research topics addressing the new media branding 3.0 environment are presented.

Keywords
Consumer engagement • Integrated content • Media branding 3.0 • OPEN framework • Participatory branding • Value chains

1 Media Branding 2.0 Revisited

1.1 Evolving Business Models

In 2011, the growing multichannel, multimedia marketing environment presented a new layer of brand management challenges that represented the realization of the second generation of media branding scholarship and research, colloquially referred to as media branding 2.0 (Chan-Olmsted, 2011). From a macro perspective, this meant marketers had to ensure their products and messages were synergistic across different media and channels, while simultaneously taking advantage of each medium's unique characteristics. This shift towards the use of multimedia outlets

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presented both opportunities and challenges for media firms. In regards to content delivery, when a branded content is accessible through multiple platforms, there are more brand touch points and better responsiveness to consumer needs (Chan-Olmsted, 2011). However, the use of multiple delivery outlets has the potential to dilute brand associations for media brands as well (Chan-Olmsted, 2011). For example, the delivery of video content and television programs outside of the brand environment, such as airing a *FOX* show on *Hulu.com*, may also decrease the brand association derived from its network identity.

While the shift towards the delivery of media products and content via multi-channel, multimedia platforms may be inevitable as a result of consumers becoming more mobile and networked, the main issues surrounding the proposition have changed. The corporate discourse no longer focuses on how the newer platforms might siphon away audiences from the more traditional outlets, but how the different delivery systems might best complement each other in responding to consumers' on-demand needs, while simultaneously contributing financially through the use of either different or evolving business models (NBCUniversal, 2014). In fact, many traditional mass appeal content companies such as the U.S. television network, *NBC*, are treating their assets differently. *NBC* now sees its production resources as story-driven content centers, rather than individual show production units. Accordingly, it examines each story written and matches the content with the most appropriate platform for distribution, thus customizing distribution to allow for the best match between audience and platform (NBCUniversal, 2014).

These evolving business models hail the creation of a new challenge for which the arrival of multimedia platforms is the catalyst. Essentially, now the decision of how to appropriate one's branding efforts between content/programming like *Law and Order* (i.e., individual products) and the organization/channel like *NBC* (i.e., the corporate source of the product) is far more complex. Logically, there exists a symbiotic relationship between the two. Studies have shown that perceptions of a program's brand success or failure have an enhancement or dilution effect on broadcaster brand image (Drinkwater & Uncles, 1992). Additionally, program familiarity intensifies these effects, while congruity or incongruity of program and brand image produces enhancement or dilution effects on broadcaster brand image (Drinkwater & Uncles, 1992). While the reciprocal value of a program brand to its parent brand (i.e., the channel or network) might be considerable, contemporary challenges in the electronic media industries threaten this relationship. The increasing fragmentation of the audience, the proliferation of distribution channels, and the advancement of technology that allows for time and platform shifting according to the immediate needs of the audience, all contribute to an environment where the value of corporate or channel branding might be diminishing.

1.2 Participatory Branding and Brand Control

As we are seeing more and more fluidity in content moving across multiple platforms (e.g., cross channels or platforms), the brand identity of the source might become less relevant, especially when the content or programming itself has acquired its own unique brand associations (Keller, 2001). With limited marketing resources, media brand managers should examine the strengths and favorability between a source/corporate brand and its programming components/brands. Furthermore, the types of brand associations should also be reviewed in order to arrive at the ideal mix of activities that will facilitate the creation of a positive feedback loop benefiting both brands. As the Internet becomes more dynamic and interactive, consumers are becoming participants in the creation of brand associations rather than just the recipients. In fact, brand managers today play a role that is more like *brand hosts* than *brand guardians* (Chan-Olmsted, 2011). This loss of brand control is a side effect of the Web 2.0 mechanism, and now brand strategies must incorporate co-creation into their development, a practice that often leads to diminishing control of the brand source (Chan-Olmsted, 2011).

An alternative perspective on the decrease in brand control is the increase of opportunities to brand through consumer experiences rather than strictly through the product itself (Chan-Olmsted, 2011). For media brand mangers this can mean shifting the focus from a linear content consumption transaction with the consumer, to a brand immersion experience that includes cohesive, multiplatform activities to engage the consumers no matter where they are (Chan-Olmsted, 2011). The *ABC News Channel* on *YouTube* is a prime example of a media brand accepting a state of diminished control, in order to benefit from an increased opportunity to expose viewers to the *ABC* brand (YouTube, 2014). The interactive characteristics of social media like *YouTube* provide excellent brand engagement and development opportunities. For instance, through the use of social media, media brands can develop one-on-one conversations between the consumers and the characters or the content creation crews (e.g., producers, writers, etc.), incorporate a feedback mechanism for consumers to express their opinions about certain content (e.g., reader forums), and even involve the consumers in the creative process (e.g., auditioning as talent or shaping plots) (Christodoulides, 2009). While the strategic use of social media is different dependent on the nature of the brand, certain types of media products are more compatible with the value generated from social networking and consumer involvement. For instance, content products such as drama and reality programming are more likely to benefit significantly from regular audience engagement via social media (Chan-Olmsted, 2011). Ultimately, the degree and type of involvement a brand manager expects the audience to have through social media is no longer an after-thought, but an essential strategic deliberation.

1.3 OPEN Framework

For media managers looking to summarize the aforementioned media branding 2.0 concepts in a succinct and parsimonious manner, consideration should be given to the *OPEN framework* of media branding and its constructs: On-demand, Personal, Engagement, and Networks (Chan-Olmsted, 2011; Mooney & Rollins, 2008). These four characteristics succinctly capture the difference of branding in a post web 2.0 media environment. From the perspective of *on-demand branding*, for instance, it would be fruitful to examine how consumers perceive the value/utilities of different media platforms at different times and settings; and thus how media service/content can be formatted, integrated, and distributed via multiple platforms to be responsive to the needs of the consumers (Chan-Olmsted, 2011; Mooney & Rollins, 2008). From the perspectives of *personal* and *engaging* branding, it would be important to study how the different personalization and engagement mechanisms on media platforms contribute to the development of brand relationships between consumers and the media brands, thus allowing brands to develop an intangible personal feel to their content that creates a long-term emotional investment from consumers (Chan-Olmsted, 2011; Mooney & Rollins, 2008). Finally, from the perspective of networked branding, it would be beneficial to investigate the effectiveness of different co-branding strategies in improving perceived network externalities and enhancing the CBBE (consumer-based brand equity) for various media products, allowing for seamless new product integration into existing brand messages (Chan-Olmsted, 2011; Mooney & Rollins, 2008). The notion is that an *OPEN brand* will improve on: (1) its revenues because of the ability to gain access to more diverse audiences more quickly; (2) its *return-on-investment* (ROI) because it will spend its marketing dollars more effectively; and (3) its consumer relationships because it can develop relevant and innovative approaches to turn consumers into allies (Chan-Olmsted, 2011; Mooney & Rollins, 2008).

2 The Origins of Media Branding 3.0

As a result of the structural, technological, and consumer changes that have affected the media marketplace since 2011, there has been a resurgence in the need to both re-affirm and reshape the parameters of media branding strategies. For example, with the continuous growth of mobile and social media usage, there is increasing demand to integrate mobile and social platforms into all brand management strategies. In 2013, *Netflix* and *YouTube* combined began to account for over 50 % of Internet traffic in the United States measured in bytes, demonstrating the strength of brands that pursue on-demand consumer contexts (Brustein, 2013). While these highlights just scratch the surface of Internet related development since 2011, they all represent extensions of the World Wide Web that, “enable people to share content beyond the boundaries of applications and websites.” (Semantic Web, 2014, para. 1). This is the defining characteristics of the semantic

web, a milestone in Internet technology development that when realized was set to mark the beginning of the web 3.0 era (W3C, 2014).

The web 1.0 era was classified as Internet technologies like Geocities and Hotmail that were read-only content created through the use of static HTML websites (Radar Networks, 2007). The most common way of navigating the Internet during this era was the use of link directories, like *Yahoo!* (Radar Networks, 2007). Web 2.0 was realized upon the creation and rise to prominence of user-generated content, which shifted the dynamic for users from *read-only* to *read-write* (Radar Networks, 2007). Since entering the web 2.0 era consumers have been consuming and contributing information through blogs or sites like *Flickr*, *YouTube*, and *Digg* (Radar Networks, 2007). The line dividing a consumer and content publisher is increasingly blurred in a web 2.0 environment (Bruns, 2009). While web 3.0 has been described theoretically in a variety of ways, including a web of data, a utopic version of the Internet, or the next evolution of computer-human interaction in our daily lives, the discourse that has achieved the most amount of consensus is that web 3.0 is inherently the realization of a semantic web (W3C, 2014). Intelligent search recommendations, personalization services like *iGoogle*, and behavioral advertising are all examples of how the World Wide Web has been extended beyond traditional websites and applications, as we begin to see a blurring between the virtual and the real (e.g., augmented reality systems layering virtual information onto the real world) (Semantic Web, 2014). The key characteristics that web 3.0 has been theorized to deliver are: more intuitive interfaces; contextually relevant and easily interpretable content; a portable and personalized web experience that focuses on individual needs, smart user engagement, and *advertainment* (e.g., *TiVo* and *Pandora*); user-tailored experiences that are not linear in nature, but are customizable on the user's end; integrated, complex, and intelligent information with dynamically changing content that consistently provides users a connection to relevant information; and an Internet connection that allows users to access any media, on any device, and from anywhere in the world (Semantic Web, 2014; W3C, 2014).

As we begin to meet the assumptions of a web 3.0 era of Internet technologies contextual consideration must be given to how media branding will be affected moving forward. First, it is clear that the power for creating and maintaining brand associations is shifting towards audience and audience communities (Chan-Olmsted, 2011; Napoli, 2011). Accordingly, brand managers need intelligent agents to learn about the audience, to provide more personal relevance in the brand messages coming out of the corporation, in hopes that audience relevance will mitigate the need for consumers to wield their power to change brand associations. Consideration must also be given to integrated platform delivery, as consumers will be able to avoid brands that are not omnipresent on all media platforms (Jenkins, 2008). Storyline branding could help content producers achieve integrated platform delivery, as it maintains context and connection of the brand message to the audience despite the unpredictable behavior of the consumer (Nudd, 2012). Co-branding might also help, as this will allow brand strategists to focus holistically on the audience's experience across all platforms, than each individual media

product (Thompson & Strutton, 2012). Finally, the brand message being present and available on demand in all settings while still maintaining contextual relevance is crucial for a consumer that can access the Internet anytime and from anywhere.

While it is important to identify the need for change in media branding, and the opportunities available for firms that can achieve said changes, it is of paramount importance that scholars attempt to address how these opportunities can be realized (Jenkins, 2008). Accordingly, the next section will present five changes that could lead media branding specialists to the realization of a media branding 3.0 era. Holistically, this chapter proposes that the next phase of media branding will be more about branding content consumption experience than branding the platform. That is, there will be branded entertainment and information content with a focus on how both can be willingly and easily distributed across numerous platforms, without necessarily adhering to the traditional mode of branded media outlets that are platform dependent.

3 Media Branding 3.0: The Five Changes

3.1 Change 1: The New Value Chain

The value chain of media industries traditionally includes acquiring, creating, selecting, organizing, packaging, and processing content; transforming content into a distributable; and marketing, advertising, promoting, and distributing the media service (Chan-Olmsted, 2006; Picard, 2002). While much of this remains the same, the arrival of new competitors in content production, packaging, and distribution has prompted the introduction of new business models beyond those observed in the media branding 2.0 era (Stock, 2014). Original, digital-only programming is an example of one such business model that is getting increasingly competitive in the United States. Many tech companies including *Netflix* (e.g., *House of Cards*), *Amazon* (e.g., *Alpha House*), *Hulu* (e.g. *Misfits*) and *Yahoo* (e.g. *Burning Love*) are creating premium digital series that are comparable to what can be found on *HBO* and other subscription based cable and satellite channels (Stock, 2014). The ability of the aforementioned firms to capitalize on the economic efficiencies of digital distribution has made producers of original digital-only programming more aggressive in their creation of premium programming that can compete with traditional media companies (Stock, 2014). *Netflix* will be releasing four new series in 2015 based upon *Marvel* superheroes (Marvel, 2013). *Amazon* is using their enormous user-base to crowd source opinions about what shows to continue, as they have the ability to distribute pilots directly to *Amazon Prime* instant video subscribers (Amazon Studios, 2014). These trends are not limited to entertainment content as in 2012, *Yahoo! News* received the most favorable brand equity rating for news service brands in the United States (Harris Interactive, 2012), leading to the subsequent hiring of veteran Katie Couric to head its news digest group in an effort to maintain its leadership position (Carter, 2014a).

Many of these new entrants have direct access to end users both for the purposes of retailing and spreading their brand messages. Consumer response to firms that follow these business models has been high, as the sale of digital media content has risen year-over-year, which is consistent with audiences desire to be more in control of the content they consume (Balsara, 2012; Jenkins, 2008; Napoli, 2011). This direct access to the end user is the greatest change to the traditional value chain, as ultimately firms no longer need to focus on a selection of activities along the value chain, as it is technologically feasible for a single company to complete all production, distribution, and marketing for original digital-only programming (Anderson, 2006). Accessibility to more distributors on the consumer-side has also resulted in a growing number of media consumers that are not concerned with where their media content comes from in regards to brand (Jenkins, 2008). 43 % of young adults in the United States between the ages of 18 and 36 have a subscription to *Netflix* which follows the content aggregator model (Harris Interactive, 2013), while 46 % have a subscription to cable television which follows the branded content model (Harris Interactive, 2013). Clearly, a growing number of media consumers no longer differentiate about which brand delivers the content to them, it is the consumption experience that determines consumer brand loyalty among competing content (Barkus & Schmitt, 2009).

The implications of this new value chain in the context of media brand management are far reaching. Since consumers are behaving differently in regards to how they access content and are choosing to consume media from multiple touch points as opposed to a singular source (Jenkins, 2008), they are not necessarily paying attention to the content on a single device for an extended period of time (Millenial Media, 2013). Their consumption behavior is mobile, non-linear, modular, and not device/outlet/platform dependent (Jenkins, 2008). Accordingly consideration must be given to a firm's brand image, attachment, loyalty, and relationship, to ensure that brand messages are not limited to specific platforms, but are accessible from wherever the user chooses to consume their content. In doing so a firm must also invest in market intelligence to understand how consumers consume media products and what kind of experiences they expect from consumption (McGuire, Manyika, & Chui, 2012). Another implication is that as a result of the long tail phenomenon, the marketplace is now crowded with a variety of media products both *niche* and *hit* in nature (Anderson, 2006). The long-tail explains that the economic efficiencies afforded to distributors as a result of digital distribution have the potential to create a significant media market by aggregating a high volume of low-demand products (Anderson, 2006). This differs from traditional media outlets that tend to have a low volume of high-demand content (Anderson, 2006). As a result the digital content market is crowded with new players and *points of differentiation* are harder and harder to achieve, while *points of parity* are over-saturated. This influx of new entrants is not a temporary displacement of traditional paradigms as the new value chain offers a better connection with viewers, and the long-tail is not a platform-specific phenomenon, but a digital revolution (Anderson, 2006; Chan-Olmsted, 2006; Picard, 2002; Stock, 2014). As a result, reconfiguring and customizing a media firm's value chain activities is crucial in order to establish

competitive advantages through workflow efficiencies and cost savings (Porter, 1998).

One way media brands, both new and old, are differentiating themselves is by exploiting the direct holistic access to consumers provided by the new value chain to appear consistently relevant to consumers. *Amazon*'s brand extension into digital streaming video at first appears to deviate from their core business area; however their ability to access a critical mass of consumers makes them relevant in any industry they choose to compete in (Amazon, 2014). *Yahoo*'s aggressive brand extension into news digest is only made possible by leveraging the brand equity it has generated from the popularity of its news landing page (Harris Interactive, 2012). Maintaining and expanding any brand's holistic and relevant access to consumers is crucial in contemporary marketing, and digital video appears to be the catalyst for establishing long-term brand relationships. On an average day in the United States of America approximately 89 million people watch about 1.2 billion online videos (comScore, 2012). Diversifying product brands are exploiting this audience by extending into the digital media market both as advertisers, but also as creators of original content. *Playstation* and *Xbox* have both used digital video, music, and pictures, in addition to games to establish long-term relationships with consumers while simultaneously establishing organic growth areas (PlayStation, 2014; Xbox, 2014). This also highlights the importance of brand immersion through the implementation of multiplatform experiences, and brand tests via crowd-sourced opinions. Through their vertically integrated distribution channels (i.e., *Xbox Live* and *Playstation Network*), both *Microsoft* and *Sony* exploit the benefits of the new value chain to place their video game characters in other mediums (e.g., television), while using their critical mass of consumers to test and review early versions of games (PlayStation, 2014; Xbox, 2014). All of these activities generate positive brand value through the development of electronic-word-of-mouth (eWOM) as those who experience a video game character in a television show, or beta test the most recent version of *Halo*, are not isolated from other consumers but are encouraged to share their positive brand experiences (Sharma & Pandey, 2011). These experiences are made possible by a new value chain that does not isolate creators from their consumers, but attempts to involve them in the production, distribution, and marketing value activities.

3.2 Change 2: The Power and Necessity of Engagement

The second major change that needs to take place for the realization of media branding 3.0 is highly related to the direct connection to consumers provided by the new value chain. It essentially proposes that the power of pre-established consumer engagement strategies is a necessity in order to meet the demands of audiences that have begun to expect digital branding engagement initiatives. As consumer sovereignty rises (i.e., the assertion that consumer preferences determine the production of goods and services) as a result of user-generated content, the new value chain, and other audience empowering activities (i.e., crowdsourcing, folksonomies) are

no longer considered added value (Smith, 1995). Consumers want and expect to be engaged across all media touch points they encounter, and should a desired brand presence not be found, the fluidity at which a consumer can engage with a competing brand is seamless. To illustrate both the power and necessity of social media engagement activities, Horowitz Associates (2012) research firm conducted a study of multiplatform brand salience (i.e., the degree to which your brand is noticed in a buying situation) for television shows and their corresponding social networks in the United States. 30 % of respondents age 15–17 said they had discovered new TV shows that they now watch because of a post on social media or other sites; 28 % stated that social media helps them to remember to tune into shows on television; 20 % agreed that being able to interact with other viewers via social media made them enjoy their TV shows more; 22 % said that while watching TV they often interact with social media and other sites about what they are watching; and finally 21 % said they post comments to social media sites or other websites about the shows they watch (Horowitz Associates, 2012). A European research team (2012) found similar results when they attempted to figure out the share of American tablet users that use their devices while watching television. 34 % of tablet users indicated that they post comments on *Facebook*, *Twitter*, a blog, or another websites regarding a show they are watching; 28 % used their tablets to look up information about a product being advertised on television; and 25 % visited a network or show's website, fan site, or app (Gesellschaft fur Konsumforschung, 2013).

It is important to note that consumers are not just consuming content on social networks, they are actively sharing it. A good example of this is the new *Simpsons World* app that in addition to allowing users to stream every episode of the program, also gives them the opportunity to share episode clips on social networks (Poniewozik, 2014). As television becomes increasingly more digitally native through the compression and distribution of shareable video clips, social media will continue to play an increasingly important role in how consumers discover and engage with various forms of content, especially TV (Poniewozik, 2014). An analysis conducted by *NM Incite* (a Nielsen/McKinsey Company) and *Nielsen* looked at the correlation between online buzz and television ratings and found a statistically significant relationship throughout a TV show's season among all age groups, with the strongest correlation among younger demographics (people ages 12–17 and 18–34), and a slightly stronger overall correlation for women compared to men (Subramanyam, 2011). Men over 50 showed the weakest buzz-to-ratings connection leading up to a show's premiere through the middle of the season, but that relationship strengthened by the finale as all age groups were actively discussing a TV show via social media (Subramanyam, 2011). Among people aged 18–34, the most active social networkers' social media buzz is most closely aligned with TV ratings for the premiere of a show (Subramanyam, 2011). A few weeks prior to a show's premiere, a 9 % increase in buzz volume correlates to a 1 % increase in ratings among this group (Subramanyam, 2011). As the middle of the season approaches and then the finale, the correlation is slightly weaker, but still

significant, with a 14 % increase in buzz corresponding to a 1 % increase in ratings (Subramanyam, 2011).

At the genre level, 18–34 year-old females showed significant buzz-to-ratings relationships for reality programs (competition and non-competition), comedies and dramas, while men of the same age saw strong correlations for competition realities and dramas (Subramanyam, 2011). Another Nielsen (2013) study looked to investigate the casual relationship between *Twitter* use and television ratings. The study found that tweets related to certain shows did indeed result in an impact on television ratings (Nielsen, 2013). 44 % of the competitive reality episodes included in the study had *Twitter* activity lead to an increase in television ratings; 37 % for comedies; 28 % for sports; and 18 % for drama (Nielsen, 2013). The importance of the correlation between *Twitter* usage and television ratings is also highlighted by major media outlets *Twitter* activity (Pew Research Center, 2013). In 2011 the *Huffington Post* posted 415 tweets, and in 2013 it was up to 2,191. The *New York Times* went up from 391 to 544; *The Wall Street Journal* from 104 to 520; and *MSNBC* from 33 to 329 (Pew Research Center, 2013).

The power and necessity of user engagement carries with it many implications for brand managers. First and foremost consideration for user engagement must be integrated into all phases of media products. It must be considered during product design, production, distribution, and consumption. Brand managers looking for a holistic approach to customer engagement should consider involvement, interaction, intimacy, and influence (see Fig. 1). Involvement refers to the presence of a consumer at brand touch point; interaction examines the specific action a person is taking at a brand touch point; intimacy is the affection a person holds for the brand; and influence is the likelihood of a person to advocate on behalf of the brand (Gaffney, 2009). While every consumer has a different mix of the aforementioned qualities, all characteristics contribute to user engagement with the brand in the forms of discovery, evaluation, use, and affinity (Gaffney, 2009).

Twitter engagement in television programming once again provides a relevant example to demonstrate successful implementation of the engagement mechanism

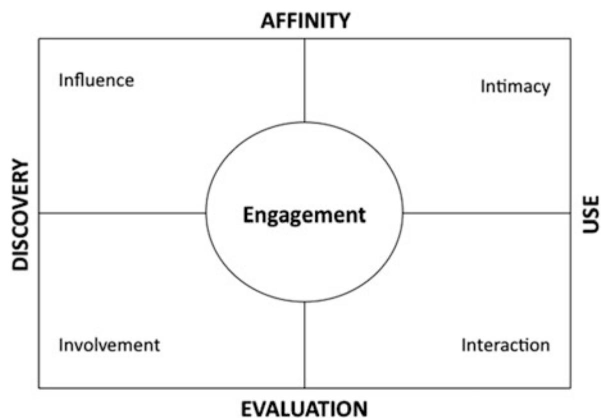

Fig. 1 Forrester's holistic approach to customer engagement (Haven & Vittal, 2008)

into all phases of a media product. Pre-show user engagement on *Twitter* should focus on attaining viewers through the use of information and activation programs (Wiredset, 2014). Marketing partnerships, hashtag strategies, application launches, and traditional media integration are all useful strategies for attaining viewers during the pre-show phase. Towards the beginning of the show the strategy develops a secondary goal of entertaining the viewers in addition to attaining more (Wiredset, 2014). Tools that helps during this phase include: tweets from show talent, curation for show talent, retweets of talent in the shows' *Twitter* feed, video clips, and a reiteration of the pre-established hashtags. As the show moves beyond the first commercial break, the goal of attaining new viewers is generally dropped to ensure full focus on entertaining those viewers who have proven to be engaged (Wiredset, 2014). This is usually done through the continuation of live tweets/retweet, replying to the tweets of viewers, Q/A session in real-time, tracking new followers and user-created hashtags for future follow-up, measurement and assessment of what worked, and promotion of next week's incentives for engagement. When the show has concluded the goal changes once again from entertaining viewers to retaining viewers. Tools that assist in this process include: scenes from net week, setup next week's *Twitter* events, metrics' analysis, establishing projected outcomes for next week's twitter usage, and tie-ins to traditional and integrated marketing initiatives (Wiredset, 2014). Particular focus should be invested in defining, encouraging, and measuring the brand engagement achieved, for any firm interested in seeing their social media engagement transition from a value-adding activity, to monetizable brand equity.

3.3 Change 3: Integrated Content Is King

In 1996, Bill Gates, founder of Microsoft stated, "Content is where I expect much of the real money will be made on the Internet, just as it was in broadcasting" (Gates, 1996). Despite criticism that such a viewpoint is too simplistic, and that the true Internet kings are all companies that provide communication services, the blurring between communication and entertainment has given new importance to the phrase, "content is king." (Gates, 1996; Odlyzko, 2001) Contemporary communication services like *Facebook* and *Twitter* do not discriminate between what is considered communication and what is considered entertainment. They empower users to create and define their own content in ways that seems most suitable to them. This empowerment and blurring of definitions is not limited to the end-consumer as it also enables brands to integrate contextually relevant brand messages from sponsors with professionally produced media content. This is known as *integrated content* and its success is dependent on maintaining consumer relevance, as media that is deemed of value to consumers may drive attention and involvement in the brand (Young, 2014). As such, it is important to consider *fit* between the sponsor message and the subject matter of the media. While industry professionals refer to this *fit* using a wide array of terms including: branded entertainment, content marketing, branded journalism, and native advertising it is ultimately the act of

integrating brand messages into professionally produced content in any capacity that allows advertisers to organically reach consumers without necessarily stopping them for a commercial break (Young, 2014). Accordingly, it may be fair to say that "integrated content is king," which is well demonstrated by the success of companies like *HBO* and *Red Bull*.

In 2009, *HBO* started a campaign where the moniker was "It's not TV. It's *HBO*." (Creative Criminals, 2009). Of course in 2009, this was not in reference to the platform the consumer was choosing to consume their content on, but to the content itself. It meant that there was something inherently different about *HBO* content than other programs on television (Creative Criminals, 2009). Over time this was arguably proven to be true as *HBO*'s exclusive programs like Game of Thrones and The Leftovers generally have significantly higher budgets than traditional television, thus allowing for superior production quality, scripts, and casting (Stock, 2014). Eventually the "It's not TV. It's *HBO*." moniker was dropped, because the statement was no longer needed. The brand message had been integrated into the show through its decisively different level of quality versus competing programs, and all that was required moving forward was a flash of the *HBO* logo before and after each program (Creative Criminals, 2009; Stock, 2014).

Red Bull's approach to integrating its brand message into professionally produced content came in a different form, as it looked to video based social networks like *YouTube* as potential public spheres for consumers interested in sharing their experience with the brand (Red Bull, 2014). While the company had a history of sponsoring unconventional and extreme stunts and sport events, it was the integrated content they offered on *YouTube* that allowed them to tell brand stories through engaging and relevant video content. Snowboard videos, live streaming sky dives, and archives of do-it-yourself (DIY) flying crafts told a story that was as attractive as competing media content (Red Bull, 2014). While it is still an important technique, having branded content appear alongside professionally produced media in the form of commercial breaks or strategically placed advertisements is no longer the only way to reach consumers. Brands that have been able to tell stories directly to the consumers through engaging and meaningful content are generating high levels of brand equity that can be leveraged in support of product engagement. A *Digiday* (2013) study on online marketing tactics indicated that 25 % of respondents felt that online branded content was the most effective way a brand could achieve their objectives. Branded content achieved the same level of importance as social networks, and search, and was considered more effective than email, mobile, or display tactics (Digiday, 2013). It is also worth noting that video was considered the most effective method in achieving branding objectives, implying that branded video content resonates highly with consumers (Digiday, 2013).

The importance of branded video content can also be highlighted by the website *Storify*. The concept behind the emerging social network is that what people are most interested in consuming are curated stories that put contextual relevance into what a viewer is consuming (Storify, 2014). Accordingly, it allows users to collect media from around the Internet, create a story via the *Spotify* applet, as well as share, publish, and embed that story practically anywhere on the Internet

(Storify, 2014). The success of Storify and the importance of branded video content that tells a compelling story have triggered a variety of brands including *Politico*, *CNNMoney*, and *HBO* to use *Storify* as another tool for integrating brand messages into meaningful content (Storify, 2014). Despite the recent success stories surrounding story driven branded content, there are certain challenges that have emerged that are both ethical, and organizational. From an ethical perspective, there is much discourse surrounding whether incorporating branded content into news media compromises journalistic integrity. Another consideration from the brand management side should also be whether it will serve to further dilute the brand message and confuse the consumer.

While there is no simple answer to the issues surrounding branded journalism, each media firm must look to their mission and substance of their content to determine whether incorporating market driven, branded journalism is contextually relevant and beneficial given their corporate culture. For example, *Forbes BrandVoice* advertising initiative works for marketers because of the equity that *Forbes* has established with its audience (Forbes, 2014). The location of ad space within *Forbes.com* and the print edition lends credibility to companies that participate in this program, but only so far as *Forbes*' credibility remains (Forbes, 2014). Informed consumers also know that *Forbes* will not want to damage the trust in their brand, both from a journalistic perspective, and from a long-term growth viewpoint (Forbes, 2014). This approach is valuable to the media brands that are looking to distinguish their offering and value, while at the same time fear they are being commoditized in a marketplace where real-time bidding on ad inventory and automated ad networks is growing.

Shifting to look at the organizational side of branded storytelling, consideration must be given to whether *brand communicators* need to be developed to act as both internal and external champions on behalf of the media entity (Beurer-Züllig, Fieseler, & Meckel, 2009). *Brand communicators* look to combine the tenets of journalism with brand storytelling to provide a transparent, open and engaging way to have a conversation about a brand and tell its story to an interested audience (Beurer-Züllig et al., 2009). This of course requires a large investment of resources by the firm, as well as the willingness to adhere to the values embedded within the stories being promoted. Another method for bringing context and relevance to a brand's story without necessarily going through a brand communicator is digital curation (Kramer, 2010). This allows a media entity to curate their brand's story digitally during the distribution of their content in an attempt to bring larger context to a user's digital access experience (Kramer, 2010).

The recent proliferation of content marketing has left many researchers and analysts considering the long-term brand implications (Young, 2014). As this is a pioneering area of media branding 3.0 it would be difficult to speculate that the marketplace has truly experienced the broader implications of native branding, but an early look suggests that consideration should be given to an increase in the amount of co-branding relationships (Thompson & Strutton, 2012); the potential for brand equity dilution as a result of consumer confusion as to who is the originator of aggregated content editorial integrity of engaging in branded journalism; the

potential for new competition to be generated from independently branded story driven content (e.g., could a *Red Bull* sky diving video achieve a higher audience than a primetime television program?); and finally the potential development of brand content syndication outlets that farm out branded content to populate vacant space on the Internet (Wallenstein, 2013).

3.4 Change 4: Intelligent and Connected Media Access

Another change we are facing today is the development of networked, connected, and intelligent media access. With the proliferation of connected devices, the focus is on the act of consumption, not the devices or access points (Jenkins, 2008). Consumers expect fluid transitions from one access point to the next (Napoli, 2011). The content needs to follow the consumer and be presented in the optimal format for consumption on that particular platform or combination of platforms (Jenkins, 2008). As cloud services in mobile, network, database, server, app, and web industries proliferate consumers are no longer limited to pre-established linear media habits but can choose to be well informed active media consumers (Jenkins, 2008). This behavioral shift is a result of web 3.0 powered intelligent networks that are accessible from mobile devices, intelligent personalization software derived from actual user behaviors (e.g., Apple genius recommendations), and an increase in cloud-based media service. Stepping away from consumer demands, just the act of using the Internet as a mobile repository of media and information requires sophisticated and networked synchronization technologies converging across multiple media platforms. The evidence of such a change within the marketplace can be found in the sales metrics of converged technological devices.

An *eMarketer* (2013) study reported that in 2013 the number of smart TV households in the United States grew to 23 %, up from 15 % in 2012, and 8 % in 2011. Furthermore, it is anticipated that smart TV penetration will hit 29 % of American households by the end of 2014, and 40 % by the end of 2016 (eMarketer, 2013). While there can be little doubt that consumers are demanding more sophisticated technologies that provide them 24/7 intelligent and networked media solutions, some critics would argue that this does not necessarily necessitate a change in consumer behavior. In an attempt to provide an impartial and empirical response to this line of thought a European research team conducted a study of American media consumers, specifically trying to identify whether the primary attention of media consumers was indeed becoming more complex (i.e., splitting across platforms), or staying relatively simplistic in nature (i.e., exclusive to a single platform) (Gesellschaft fur Konsumforschung, 2013). The findings demonstrated that 36 % of second screen users that were engaging both a television and tablet simultaneously felt that they were equally focused on both devices (Gesellschaft fur Konsumforschung, 2013). While it is worth noting that 36 % primarily focused on the tablet exclusively, whereas 28 % focused on the television exclusively, it is impressive to see that multiplatform consumers are not necessarily

replacing one platform with another, but are actually choosing to consume more media (Gesellschaft fur Konsumforschung, 2013).

The implications of the proliferation of intelligent and connected media access are extensive for media brand managers who must address how content design, production, distribution and presentation can be fluid across platforms. While it can be a challenge to manage the multiplatform and app ecosystems while maintaining a consistent brand message, the benefits of integrated and engaging content streamed directly to the consumer at whichever media touch point they access the Internet from have been extensively discussed in the previous sections. One potential solution for ensuring a uniform brand message is maintained across all converged media devices is through the use of *brand advocates* (Sharma & Pandey, 2011). By identifying and amplifying the power of *super-engaged* cross-platform users it is possible to protect your brand message while simultaneously promoting tertiary brand touch points to greater prominence (Sharma & Pandey, 2011). Other tools include *brand transparency* to mitigate any undesirable information that is diffused as a result of the reduced control over multiple touch points (Biro, 2013); and *brand reputation training* for all employees as any employee with a social network can cause positive or negative *brand value* (Jiyoung, Yang, & Kim, 2013). Finally, since intelligent network access points are still in the growth stage of the product life cycle it would be an opportune time for brand managers to experiment with access sequence impacts, and determine whether the order in which a user is exposed to information across different platforms impacts their brand loyalty and relationships.

3.5 Change 5: Data Everywhere

The last major change that has heralded in the media branding 3.0 era, is the availability of big data (McGuire et al., 2012). The lowering costs of computer memory coupled with increased capacity enable companies to track every interaction with a consumer to a level that was not previously attainable. *Disney* for example has changed their traditional season passes into scannable wristbands that extract market intelligence on everything from popularity of merchandise, to ride wait times (Disney, 2014). The unique element of this change is that it invariably supports and informs all the other changes discussed in the previous sections. The direct access to consumers made possible by the new value chain when supported by big data allows for tracking and measuring of the full consumer experience from *engagement* to *post-purchase brand interactions* (McGuire et al., 2012). The success of multimedia user engagement opportunities are tracked and learned from to ensure future engagement activities are equally or more successful (e.g., tracking twitter activity during a live broadcast to set goals for future twitter engagement initiatives) (Wiredset, 2014). The market intelligence extracted from the aforementioned engagement experiences is then used to inform brand managers on how best to integrate the firm’s brand message into professionally produced media content. Finally, the proliferation of intelligent networks has shown the

practical consumer benefits of the availability of big data by consistently streaming sports and news information into customized news tickers on the bottom of one's television, to tracking what products are in the fridge and sending out mobile alerts when a household is getting a low on milk and other beverages (Cisco, 2014).

From an organizational perspective a 2012 study conducted by *IBM* and the *University of Oxford's Said Business School* demonstrated that more and more companies are recognizing the competitive advantages that can be derived from big data. In 2012, 63 % of UK respondents agreed that big data can be used to identify *unique selling propositions*, up from 34 % in 2012 (IBM & Oxford University, 2012). 38 % of respondents indicated that they use big data for customer-centric outcomes; 26 % used it for optimizing operations; while 18 % used it for enabling new business models. 90 % of respondents indicated that big data is generally gathered during business transactions, followed by 72 % of respondents gathering big data from data logs (the source of these logs was not specified) (IBM & Oxford University, 2012). In the United States studies also indicated a newfound importance on big data, as *eMarketer* (2013) found that 64 % of agency respondents, and 64 % of marketer respondents indicated that the leading benefit of big data is, "developing greater insight into the customer experience across all types of media, and then creating a strategy that turns this understanding in positive results." While it is clear that many organizations are recording big data in order to benefit from the opportunities it presents, brand managers should be aware that 41 % of UK companies in the IBM/Oxford (2012) study cited a lack of understanding of how to use big data to impact business as the number one reason for not engaging in a big data collection opportunity. Ultimately, attempting to utilize big data without prior knowledge of how it has been successfully applied is likely to result in challenges. *Amazon* presents an excellent case study for any brand mangers interested in learning from historically successful applications of big data.

Amazon is likely the most widely known example of an international firm that uses big data for key business goals. In 2013 *Amazon Studios* posted 14 different pilots for any interested customer to watch and rate (Solsman, 2013). Two of those shows, *Alpha House*, and *Those Who Can't* were made into full series (Solsman, 2013). This big data agenda is not something new for *Amazon* as past acquisitions target information/data based companies. The 1998 acquisition of the *Internet Movie Database* (IMDb) is now paying off major dividends, as *Amazon* is able to make purchase recommendations based on what movies users have searched for on IMDb (2014). Other big data acquisitions made by *Amazon* include *Goodreads*, a social cataloging website for books (goodreads, 2014); *ComiXology*, the most commonly used cloud-based digital comic reader (comiXology, 2014); and *Alexa*, a web-based information company that ranks websites based on Internet traffic (Alexa, 2014). An important takeaway from this *Amazon* example is learning when to combine audience data with other interactive data (e.g. IMDb) to achieve a greater vision of the marketplace. While big data is a crucial component of this new media branding landscape, it is particularly important to remember that media is an art form, and while big data is a useful tool for understanding your consumers, the brand stories being told must be engaging and immersive.

4 Media Branding 3.0: Looking Forward

While not all media brands have adjusted to the changes presented by the media branding 3.0 environment an excellent example of a brand that has is *Netflix*. In the United States, *Netflix* now has more paid subscribers than *Comcast* (cable television provider), and at the time of this writing *HBO* (who has keenly begun introducing subscription options for consumers who want *HBO* content without a satellite or cable television subscription) (Lawler, 2013). Internationally, *Netflix* membership has topped 40 million worldwide, with its revenue hitting $1.1 billion at the end of 2013 (Carter, 2014b; Lawler, 2013). In regards to their specific branding strategies and their relationship with the five changes outlined above, *Netflix*'s value chain is holistically designed so that every value activity attempts to address user personalization and choice as efficiently as possible. An example would be how their direct access to consumers allowed them to implement a *folksonomy* (i.e., a user generated cataloging system) for ranking their content. Instead of basing their star ratings off of film experts and movie critics, they ask users to rate films they have seen so they can develop a critical mass of crowdsourcing data so recommendations are more organic and in-line with what likeminded users' desire (Shih, Kaufman, & Spinola, 2009). This user generated ranking system is also a form of user engagement, as it encourages participation in the *Netflix* brand and community beyond the consumption of media itself. Recently *Netflix* has partnered with *Facebook* so users can post what film they are watching on their *Facebook* timeline, as well as access crowd sourced recommendations based on what is popular among their Facebook friends (Netflix, 2014).

Integrated content is also a high priority for *Netflix* through the development of its *Netflix Original* line of programming (Netflix, 2014). The most well-known example of this integrated content is *House of Cards*, but other programs like *Orange is the New Black*, and *Lilyhammer* have received critical praise (Netflix, 2014). Other forms of integrated content include *revived programs* that have been cancelled on other networks, and then renewed for another season on *Netflix*. The most prominent examples of *Netflix*'s revived content includes the *Emmy* award winning *Arrested Development*, the critically acclaimed *Star Wars: The Clone Wars* series, and cult favorite *The Trailer Park Boys* (Netflix, 2014). The brand association *Netflix* has established for reviving cancelled content is so high, that there are websites and community groups specifically focused at bringing cancelled series to *Netflix*'s attention so they have an opportunity at a second run. Currently it is forecast that the company will spend $1 billion by the end of 2014 for exclusive content that is both popular/hit (e.g., *House of Cards*) and niche (e.g., *Trailer Park Boys*) in nature (Shafer, 2013). This of course is in line with the firm's core brand identity of user choice. *Netflix*'s commitment to intelligent networks and connected media access has always been a part of their technology strategy. The company has proven it evolves with technology and the context of user usage and preferences. The best example would be their aggressive support of streaming video at a time when the technology was not able to support a massive distribution infrastructure, and their core revenue stream was DVD rentals (Shih et al., 2009). Another

example is their current support of the Ultra High-Definition (Ultra HD) video resolution, while few consumers even own the necessary 4 K televisions to enjoy the format. Finally, while CEO Reed Hastings does acknowledge that in the late 1990s and early 2000s, before the prominence of both *Netflix* and big data, the company was unable to test every strategy they developed (Shih et al., 2009); today they are proud to test everything including consumer interactions, product offerings, and pricing. *Netflix*'s technology blog explains,

> At Netflix we engage in what we call consumer science: we test new ideas with real customers, at scale, and we measure for statistically significant differences in how they engage with our product... if you're going to fail, fail cheaply. And *know* when you've failed, vs. when you've gotten it right. Product development at Netflix starts with a hypothesis, which typically goes something like this: Algorithm/feature/design X will increase member engagement with our service, and ultimately member retention (Netflix, 2011, para. 1, 5).

This approach, which is actually only possible as a result of the attainability of big data, demonstrates how big data can be harnessed to ensure brand success. While it is clear that *Netflix* operates successfully in a media brand 3.0 environment, the introduction of this paper explained that while it is important to form new branding strategies, other traditional approaches to branding have also been re-affirmed. *Netflix* engages in co-branding with *Best Buy* to increase consumer touch points. They promote their free 30 trial both on *Best Buy*'s website, in-store, and sometimes flyers are placed with related products like HD televisions (Best Buy, 2014; Shih et al., 2009). This relationship is symbiotic as the *Netflix* brand encourages people to invest in home electronics, while the presence of the *Netflix* in consumer electronics stores legitimizes the brand in the eyes of brick and mortar consumers. The importance of *brand relationships* has also been re-affirmed as *Netflix* tries to cultivate a fun atmosphere during customer service exchanges. Its customer service motto is, "the responsibility is to solve the problem and the freedom is to do it your way" (Stenovec, 2013). The most enduring example of this motto in action is when a customer named "Norm" had a digital chat with a *Netflix* customer service representative named "Michael" (Moran, 2013). The exchange started with Norm saying, "Hi, I have a problem to report," to which Michael replied, "This is Cpt. Mike of the good ship Netflix, which member of the crew am I speaking with today?" Norm responded with "Greetings, Captain. Lt. Norm here," and for the rest of the conversation both Norm and Michael stayed in character (Moran, 2013). The transcript of the conversation was posted on *Reddit*, and news and business websites from around the world picked up the story. The exchange resonated with anyone who's ever sat through the hell of an automated customer service call, and another example of how *Netflix* is aiming to do something different with its customer service (Moran, 2013). Netflix help chats do not feature a robotic, dizzying array of menu options, or a company agent using a script. "We really allow support agents to be themselves," Brent Wickens, *Netflix*'s vice president of global customer support, told *The Huffington Post* in a recent interview (Stenovec, 2013, para. 6). "They're not restricted in any way. If

somebody wants to talk to somebody in character, we encourage this" (Stenovec, 2013, para. 6).

Despite many traditional branding strategies being reaffirmed and new models being identified this analysis of the media branding environment has also raised some questions for further research. As the majority of the media branding 3.0 environment focuses on understanding the consumer, research should look to better define the new media consumer, their values, motivations, behaviors, and potential contributions to media branding. A deep dive would also consider who the *brand influencers* and *advocates* are, how do they rise to prominence, and what factors affect their influence. Consideration should also be given to the volume and types of access points that are emerging and whether all are appropriate for the use of media branding. Finally, empirical assessments comparing the *brand loyalty, associations, image*, and *content type dependency* of brand content versus branded media outlets/platforms should be conducted so the information could be synergized into a brand content typology, advising media brand mangers on when different integrated content strategies can expect to be successful. This survey of the media branding 3.0 landscape has identified both opportunities and challenges for brand managers moving forward, and while unpredictable consumer behavior is likely to reveal a few unexpected surprises, the propositions and assumptions described here provide both academics and industry specialists a benchmark from which to strategize.

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