What audiences want

Gary Hayes

Senior Development Producer

BBC New Media - Interactive

What audiences want

"How do I know what I think

until I see what I say"

Lewis Carrol, Alice in Wonderland

What audiences want

THE EVER CHANGING MEDIA ENVIRONMENT - Part One

Interactive SERVICES to all platforms DTV, PC, Replicated media, Personal TV & Mobile

First questions & what they say they want

- 1 Broadcast Linear Digital & Analogue
- 2 Broadcast Information (News. Weather eg: DText)
- 3 Broadcast Education (On-line learning)
- 4 Broadcast Entertainment (including: games)
- 5 On Demand Video, Audio & Games
- 6 eCommerce (shopping)
- 7 Communication - Email (TV, PC & mobile)
- 8 Combinations of all the above (cross media)

What audiences want

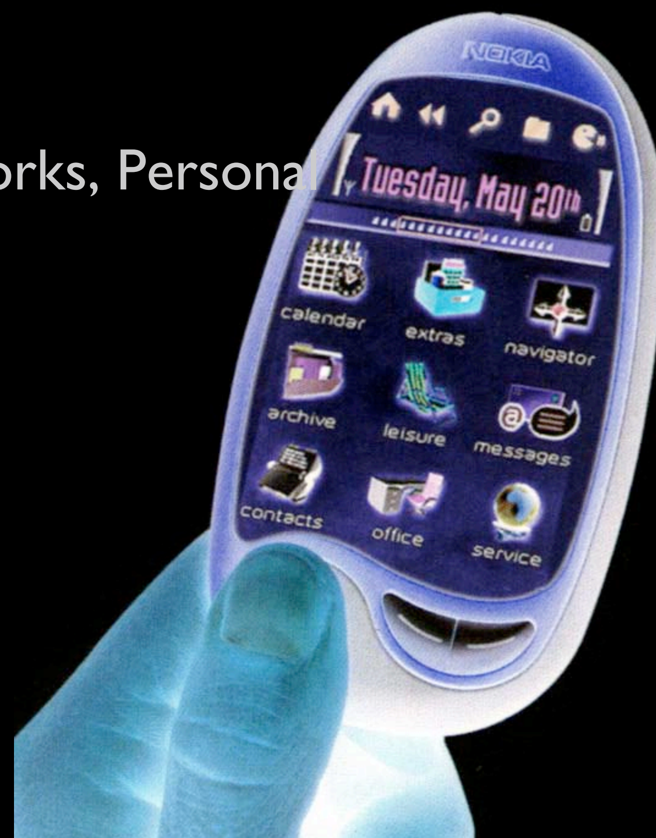
The Interactive Media Stakeholders

- Content creators
- Content owners
- CONTENT PROVIDERS
- Advertisers, promoters & ad distributors
- Software developers
- SERVICE PROVIDERS
- Portal owners
- NETWORK OPERATORS
- EQUIPMENT MANUFACTURERS
- Equipment retailers
- CONSUMERS

What audiences want

Part Two - ENABLING PLATFORMS (Tuesday)

- 1 Digital Television DTV
- 2 Web all Over
- 3 The Mobile World
- 4 Putting it all Together - Home Networks, Personal TV & Integrated Devices
- 5 Narrow and Broad, TV and PC
- 6 Replicated Media (eg: DVD)



What audiences want

Creating services, our very first questions...

- Ask, who do we want to reach
- Ask, how many do we want to reach
- Ask, what will the viewer experience be
- Ask, how will the viewer perceive us for this experience
- Ask, how do we want to reach them
- Ask, how do we keep them loyal and involved

What audiences want

What they say they want...

- •I need to explore in more depth, at my own pace
- •I want to ‘link’ out to more - especially around my local area
- •I expect relevant facts & activities on demand - immediately
- •I would like alternative rich media, video and audio
- •I want to personalise my experience - choose my own routes
- •Let me contribute, give my opinion to others and the makers
- •I would like the producers to automatically know what I “really” found interesting - during and for next time

What audiences want

1 Broadcast Linear Digital & Analogue (ref)

- Multi channel (Sat & Cable) dilutes audiences - Sep99, 37% Sep00, 41%
- Projected mc audience Sep 03, 68%
- BBC One Share - in 1999 had 27.4% in 2000 it has 26.3%
- 14% NOP consider TV will be more **INTERACTIVE**
- Using TV and Web viewers watched programmes more. Top of list - Tommorow's World, Top of Pops, Snowboarding & Inside Rugby!

What audiences want

2 Scheduled Information (News. Weather eg: Dtext & EPG's)

- **19 million** users per week of 'Teletext' Services
- In WebTV trials **44%** of audience actually click through to more info (BBC News, TOTP and Eastenders are the top 3)

UK Digi TV viewers use the following (July00)

- 73% EPG & other 'portal' guides to services
- 46% use the 'favourite' function **(PERSONALISATION)**
- 44% play live **GAMES**
- 18% shop in real time

What audiences want

Interactive shows - content providers viewpoint

•We deliver packages of interactivity around a linear show

•We can deliver fact sheets & research as 'real time' add-ons

•We can offer "quality *cutting room* floor" as alternatives

•Segmentation, 'clips' allows us to offer personalised routes

•We create communities & loyalty around programme brands

•Profiling & tracking allows us to really find out what people 'watched & explored'

What audiences want

3 Scheduled Education (on-line learning)

- 36% of audience *will* use interactive TV educational services
- Top three iTV service areas - Email/Web, **Educational** and VOD
- 57% would pay for educational content as part of interactive services (the next three includes web, banking, shopping)

What audiences want

4 Scheduled Entertainment (including: games)

- Top three content areas of Interactive Services - Games, Entertainment, Sports
- Mobile Games - 200 million people in Western Europe and the U.S will be playing Internet games on their mobile phones by 2005 - worth $6 billion
- 39% NOP prepared to pay for games
- PS2 biggest launch 10 mill, 1 yr
- 7.5 mill games consoles in UK

What audiences want

5 On demand Video, Audio (TV, PC, DVD, pTV & Mobile)

- 20 % of Europe receive online on-demand services by 2005
- 73% NOP prepared to pay for Video on Demand
- 95% of viewing content in USA in 2005 will be outside schedule
- 39% NOP prepared to pay for Personal TV Services

Forester research (July 2000) into Personal Digital Recorder’s

- by 2002 over 8.2 million households worldwide will be using PDRs
- 63% of those will be bundled in with sat and cable boxes
- more than 66% of current PDR users timeshift programmes daily and surf a lot less

What audiences want

MOBILE LIFE COMMUNICATION ?

What audiences want

6 COMMUNICATION - Email (TV, PC & mobile)

- There will be **more** people using the web via TV than PC in **2003** *(see below also)*
- **63%** NOP prepared to pay for Email
- Favourite areas of UK WebTV trial - **email 47%**, search 27%, **chat 16%**

Mobile Communication

- **71% of the world's** mobile subscriber base will be using mobile Internet services by 2006 (1.4 billion people)
- In 2003, the number of mobile Internet users will **PASS** the number of fixed device (TV & PC) Internet users

What audiences want

7 eCommerce (SHOPPING)

- 43% of total audience *will* shop via TV
- 17% of total audience *will* bank via TV

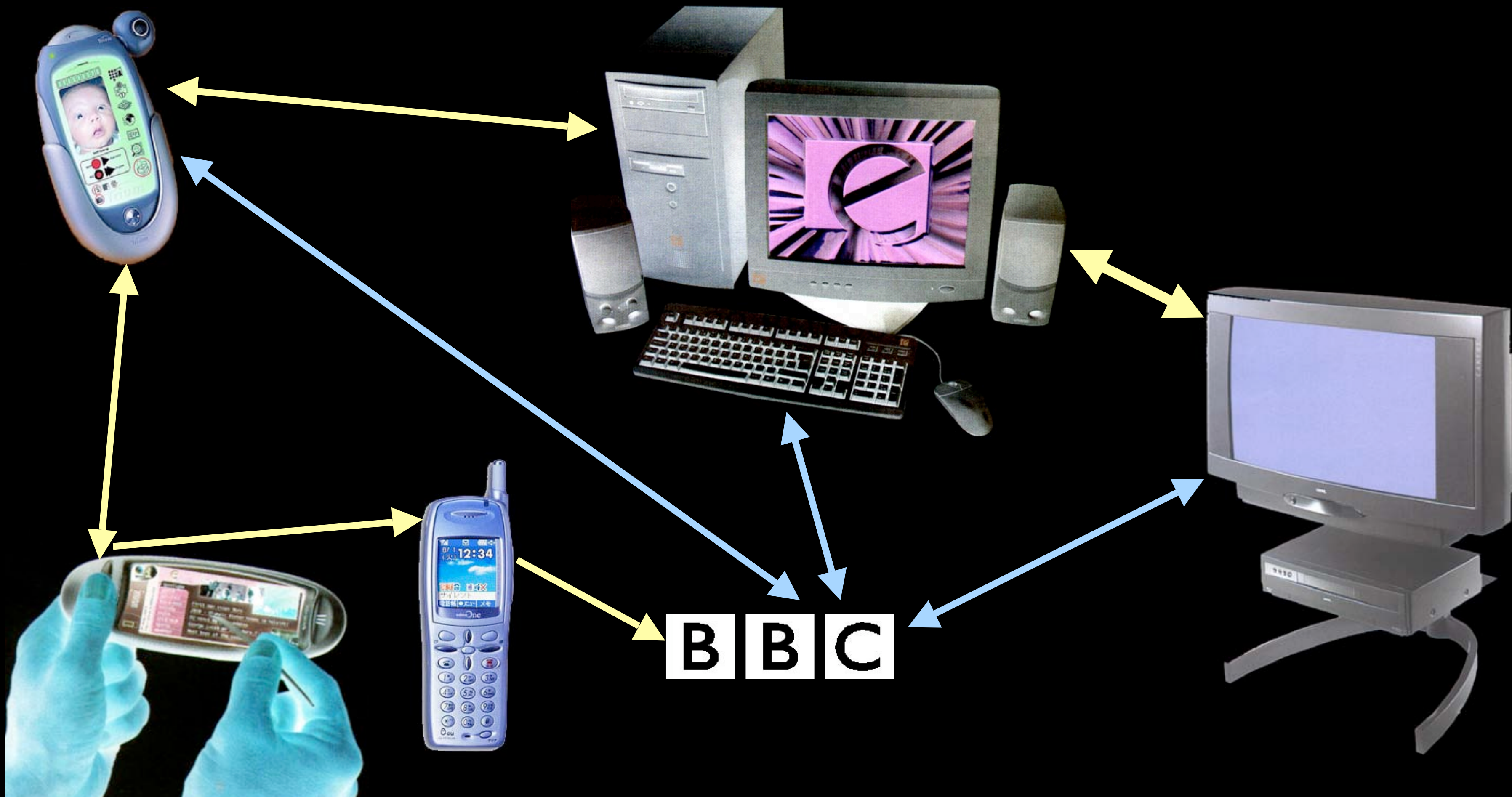
Interactive revenue streams:

- Telephone, commission, user fee, advertising, rental
- Open…. £22 mill in first 9 months, projected £146 mill end June 2001

What audiences want

Cross media thinking - loyalty, continuing the experience

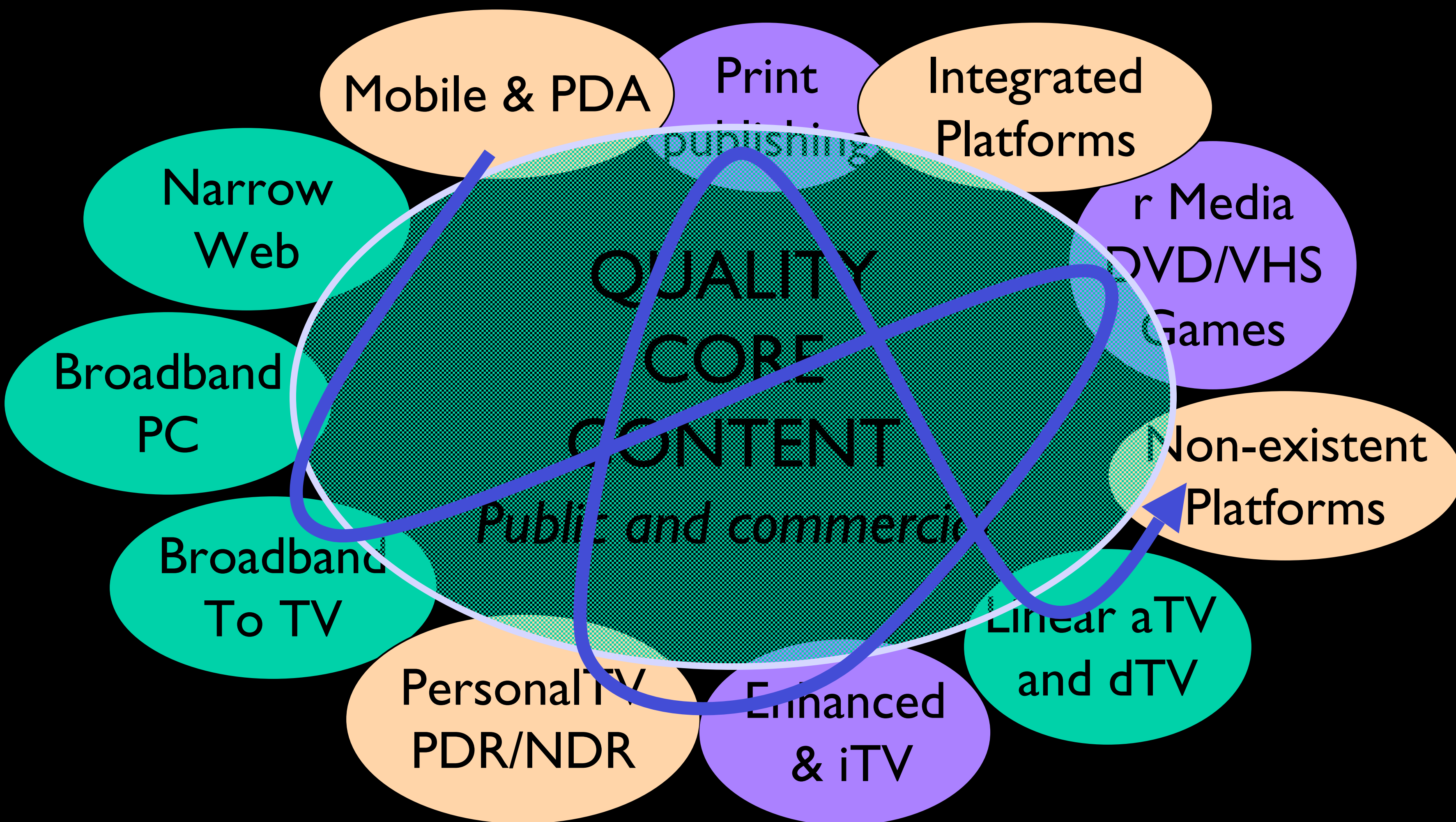
(NB: the images are metaphors for the services!)



BBC New Media   13/11/00   Gary Hayes, Senior Producer   Interactive TV

What audiences want

360 thinking and cross media experience

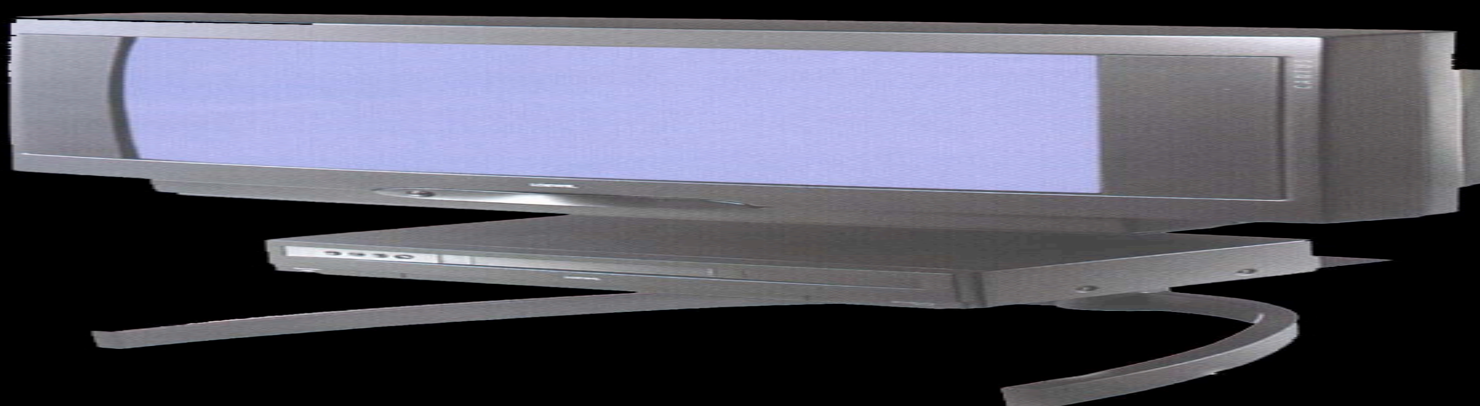


What audiences want

8 Summary - cross media combinations of all the above

Significant 'now' numbers of viewers using **COMBINATIONS** of:

- Scheduled TV and web on TV
- Mobile phone &/or PDA linked with web on PC
- On-demand video and web over on-demand broadband platforms
- Mobiles cross connecting into TV programmes
- Personalised capture services over mobile & STB



What audiences want

...END OF PART ONE...

“How do I know what I can do

until I see what’s possible”

Gary Hayes, Just Now

DON’T MISS PART TWO !

Contact

gary.hayes@bbc.co.uk