Personal Television Services

"Overcoming the challenges of integrating personalised television services with linear programming"

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CONTENT

BBC *HAT*

- Personal TV services - the basics
- What are the real issues
- Scheduled linear will survive
- Real opportunities for the bbc
- What are we doing now
- What will it mean to the audience
- Benefits of enhanced services
- Enhanced linear programmes are better
- Summary: Linear in a non-linear world

Note: all references to TV includes radio output

TV-ANYTIME *HAT*

- The business models group role in TVAF
- PDR's - the end of advertising ?

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PERSONAL TV SERVICES - THE BASICS

- What is personal TV? Personally relevant Video or Near Video on demand, enhanced or interactive TV, or good 'theme'd linear, scheduled channels ?
- TV has always been personalised - you watched what you want...
- …since broadcasters have 'told' the audience what was coming up & when it was on
- Today's PDR's & advanced ECGs are simply making the same 'forward' planning EASIER for viewers
- Most of the time-shift audience will still consume broadcast services as Personal TV services capture linear programmes

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WHAT ARE THE REAL ISSUES

- Metadata critical new 'content' - but who controls it, without a standard can we afford to tag a hundred times ?
- EPG limitations, fitting in with truncated title systems and a thousand categories
- Portals - how do channel brands fit in with portal brands
- When time-shifting reaches significant penetration how will we adjust output?
- Time-shifting may affect 50% of UK audience in 2006
- Who are the best placed to provide Personal Services - content or service providers
- Who 'controls' the viewer profiles, do they need to be mobile?
- How do we provide continuity and when viewers begin to consume segments of programmes

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SCHEDULED 'QUALITY' LINEAR WILL SURVIVE

- By being well funded and entertaining
- Because quality will always win in any multi-channel or VOD environment
- Time shifted viewing will always focus the attention on the best programme brands
- Some scheduled & time critical programmes will never disappear
    - News
    - Live sport
    - Live national events - remembrance day, Royal Funerals etc
    - Live music concerts
    - Live entertainment
    - Programmes that utilise 'live' audience participation
    - Many, many more...

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REAL OPPORTUNITIES FOR THE BBC

- Allows personally relevant 'routes' around BBC output
- Delivery of packages of theme'd or popular programming e.g.:
  - News bulletins - personalised & 'regionalised' delivered nationally
  - Highlight 'capture' of key sports or live event programmes
  - Educational packages with targeted levels of learning
  - Packages of interactive TV or web linked enhancements
  - Personally relevant capture from 'magazine' programmes
- 'Real' usage reporting - profiling the audience, aggregating individuals. Targeting of services for groups & individuals
- Ads, trails, segments and highlights of programmes & interactive services can be cross-promoted and viewer relevant

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WHAT THE BBC ARE DOING NOW

- We will respond to how people really use Personal TV systems - the research is still very new
- Channel highlights on launch service TiVo
- Channel brands will develop and thrive
- Channels will still have an identity because it is through this that viewers will still select content - BBC ONE is still the most significant UK media brand
- Increasing efforts in developing meta data, tagging systems
- Major representation in TV-Anytime Standard
- Trials with new 'digital' personal TV service providers
- Programmes are now commissioned by genre and genre controllers will have real commissioning power

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WHAT WILL IT MEAN TO THE BBC AUDIENCE

- People will, in the interim begin to consume the BBC by genre
- But will they move away from being aware of scheduled prime time or genre channels to non branded programme packages ?
- Will they expect most content on demand, pay per choice, packages of specialist, popular and niche content ?
- Niche content may be delivered off-peak to these specialised audiences

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BENEFITS OF ENHANCED SERVICES

Increased involvement in linear programme
- e.g. Karaoke, voting, quiz shows (ask the audience)

Need for quick information or update
- e.g. leader board, latest FTSE figure, what's on next

Need for enhancement to improve enjoyment of linear programme
- e.g. subtitles, song lyrics, translations or build emotional relationship
- e.g background information about programme, relationship with presenter/characters
- With return path….changing the way the linear output is viewed

Viewer as director

e.g. camera angles, alternative visuals: video vs. stage

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ENHANCED LINEAR PROGRAMMES ARE BETTER

- Enchanced TV becomes another scheduled layer & more and more channels will become 24/7 enhanced
- Interactive services allow people to take their time. Cross promotion will be a killer app, keeping people loyal to the channel brands

Case Study: Wimbledon Interactive
- 86% of users agreed it included all the information they could want
- 87% of users would like to see similar interactive services from the BBC for other sports
- 95% of users said that it was very easy to use
- Users accessed the information around the clock - not just during the games
- 16% people said Wimbledon interactive encouraged them to watch more Wimbledon

NOP Post Wimbledon research 2000

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Summary: LINEAR in a NON-LINEAR WORLD

- Linear & Scheduled TV will continue indefinitely
- There is so much more still to develop in linear programming
- Enhanced 'live' linear services will be very compelling
- We need to consider global branding - the BBC is a product
- Even if 95% of the audience time shift they still need channel based, content delivery pipes
    - The *show cases* become the 'shop windows'
    - The channels become the *'shops'* from which to choose
- Therefore viewers effectively customise their experience of a channel brand through VOD and time-shifting

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Business Models Group Role in TV-Anytime Forum

- 1. Irvine (9/99) - Mission of our working group: "*That no standard can be specified without imagining & documenting every conceivable present and future way that it could be used*"

- 2. Geneva (11/99) - Identified benefits & scenarios for consumers, content & service providers, advertisers and devised three 'evolutionery' models for the CFC.

- 3. Sunnyvale (1/00)- Compiled user centric scenarios & classifications. Developed cross-linked business benefits

- 4. Osaka (3/00)- Converged all previous and developed 'TVA Environment 'document "R1" including functionality road map for use by content ref, metadata and rights groups

- 5. New York (5/00) - Phase 2, definitive value chain scenarios cross-linked to the final specification series

- 6. Geneva (7/00) - Begun to develop and agree phase one scenarios & NDR's

- 7. LA (9/00) - Fine tuned NDR's & developed additional advertising scenarios

- 8. Seoul (11/00) - Reached a final draft of S1, benchmark apps for

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PDR's mean the end of advertising ! The BAD News

- Ads on PDR's - Fewer people get them as viewers diverge
- Ads on PDR's - Even if they do get them they skip them!
- Ads on PDR's - The shift to fewer people viewing scheduled channels - revenues drop as slots become less cost effective
- Ads on PDR's - Cannot control topicality or timeliness
- On PDR's - In trials in the United States, 88% of adverts went unwatched.
- Generally - Mass market advertising is dying and generic 'shotgun' approaches do not work anymore…
- So where are an advertisers real opportunities??

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or do they? - 'REAL' ADVERTISING OPPORTUNITIES

Targeted advertisi
we now know who is ou
indi

Non-skipping options
For additional fees advertisers can
force non-skip - regardless of

Ad *free* or ad *fu*

Dynamic Insertion
Ads can 'drop' into relevant
content and viewers

"the ad loyalty card"
my ads we give you benefits
upon

Guar
eg: G

Story lines - repeat viewings
Created via stored 'soap operas'

Virtual ad channels
viewers choose to go to
relevant ad channels

2 C
3 Effe

Topicality
pdating of commercials on the PDR
to retain timeliness

Infomercials
extending the short form ad.
Greater detail

Direct response
Instant eCommerce gratification