

Future of Personalised Media

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Introduction

Gary Hayes

- Former Senior Development Producer BBC iTV and Emerging Media (96-03)
- Chaired TV-Anytime Business Models Group (00-03)
- Now producer and consultant (LA, London)

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Introduction

THE ERAS OF EMERGING MEDIA

- The Age of Non-linear
- The Age of the Search Engine
- The Age of the Portals
- The Age of Personalisation



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Introduction...we already know the future of personalisation



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Introduction - Agenda

- ...there's something in the air. NEW TECHNOLOGY
- ...the revolution's here. NEW AUDIENCES
- ...we've got to get it together. NEW SERVICES
- ...and you know that it's right. NEW CHALLENGES



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...there's something in the air. NEW TECHNOLOGY

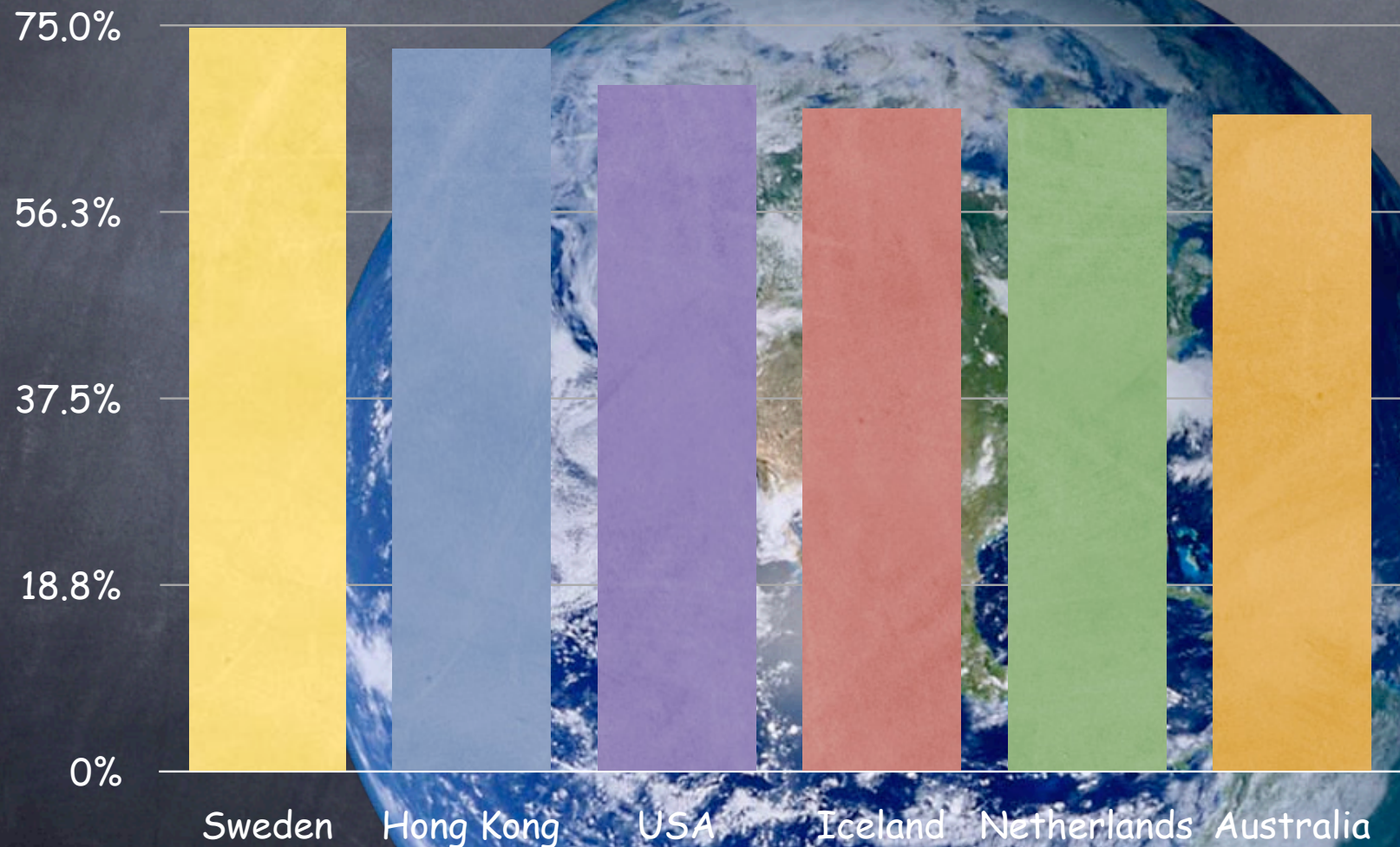
THE BROADBAND EXPLOSION

- A Worldwide increase of 55% in one year to June 2004
- 123 million broadband users worldwide
- In 2006 broadband worldwide will be 440 million (current total internet users 800 million)

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...there's something in the air. NEW TECHNOLOGY

Top 6 countries - highest internet penetration



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2004

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...there's something in the air. NEW TECHNOLOGY

- MOBILITY - 190 million cell users in USA alone
- DISTRIBUTION - Digital Television Ubiquitous
- STORAGE - PVR's 41% penetration by 2008 (forecaster). DVD fastest growing consumer item ever
- ON-DEMAND - IPTV starting Worldwide - Akimbo launch first commercial IP TV set-top service in USA in Oct 04 - 200 hours of storage
- DEVICES - MP3 player sales to grow 100% in 2004

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...there's something in the air. NEW TECHNOLOGY

18 October 2004, Bill Gates...(Media Center II)

...is predicting a future for the entertainment industry in which the traditional broadcast model of television is rendered irrelevant

- technology will change the advertising model and enable Personalised, targeted advertising (informitv)



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...the revolution's here. NEW AUDIENCES

Baudrillard (1983 *Simulacra and Simulations*)

'The boundaries between technology and nature are in the midst of a deep restructuring: the old distinctions between the biological and the technological, the natural and the artificial, the human and the mechanical are becoming increasingly unreliable'



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...the revolution's here. NEW AUDIENCES

BANDWIDTH MEANS MOVING CONTENT

- 30% of all internet traffic is p2p sharing
- On KaZaA 600 million files, iTunes 2.9 million users at any one time
- In France 31 million films downloaded non-commercially every month
- Only 4% of users worldwide have paid for film downloads!

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...the revolution's here. NEW AUDIENCES

Percentage broadband users who download films



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2004

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...the revolution's here - the BBC in 2003



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...the revolution's here. NEW AUDIENCES

- 48.6% of shared files over broadband are music, 27% of files are video
- Online music sales will overtake CD sales in less than 5 years (jupiter)
- Rental of movies (\$16.8 billion) now twice that of cinema tickets in US - REMEMBER only 4% of users worldwide have paid for film downloads!

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...the revolution's here. NEW AUDIENCES

THE TROJAN HORSE

- PVR's - 41% penetration by 2008 (forester, aug 04)
- 40% of TiVo users skip all ads, 94% skip most
- Sky Plus in 400 000 homes in UK
- "viewers will delete every unsolicited video AD off their home server like they do with email spam"

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...We've got to get it together. NEW SERVICES

"Don't let yesterday use up too much of today"
Cherokee Indian Proverb

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...We've got to get it together. NEW SERVICES



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...We've got to get it together. NEW SERVICES



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...We've got to get it together. NEW SERVICES



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...We've got to get it together. NEW SERVICES

What kind of content is best for Personalised broadband and mobile ?

- Viewers are grazing, bingeing, extending, archiving
- BBC motion gallery is offering hundreds of 1-3 minute natural history clips to AOL
- Content producers need to consider non-linear packages, segmented programs (especially magazines)
- truly personal relevant interactive services will dominate the market

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...We've got to get it together. NEW SERVICES



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...We've got to get it together. NEW SERVICES

- Personalised capture from magazine programs
- Packages of theme'd or popular programming eg: comedy
- Highlight 'capture' of key sports or live event programs
- Educational packages with targeted levels of learning
- Packages of interactive TV or web linked enhancements
- News bulletins - Personalised 'regionalized' and UPDATED

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...We've got to get it together. NEW SERVICES



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...We've got to get it together. NEW SERVICES

"The BBC will make its services available when and where people want them, with a new generation of BBC on-demand services...We intend now to extend this service to television" IMP2



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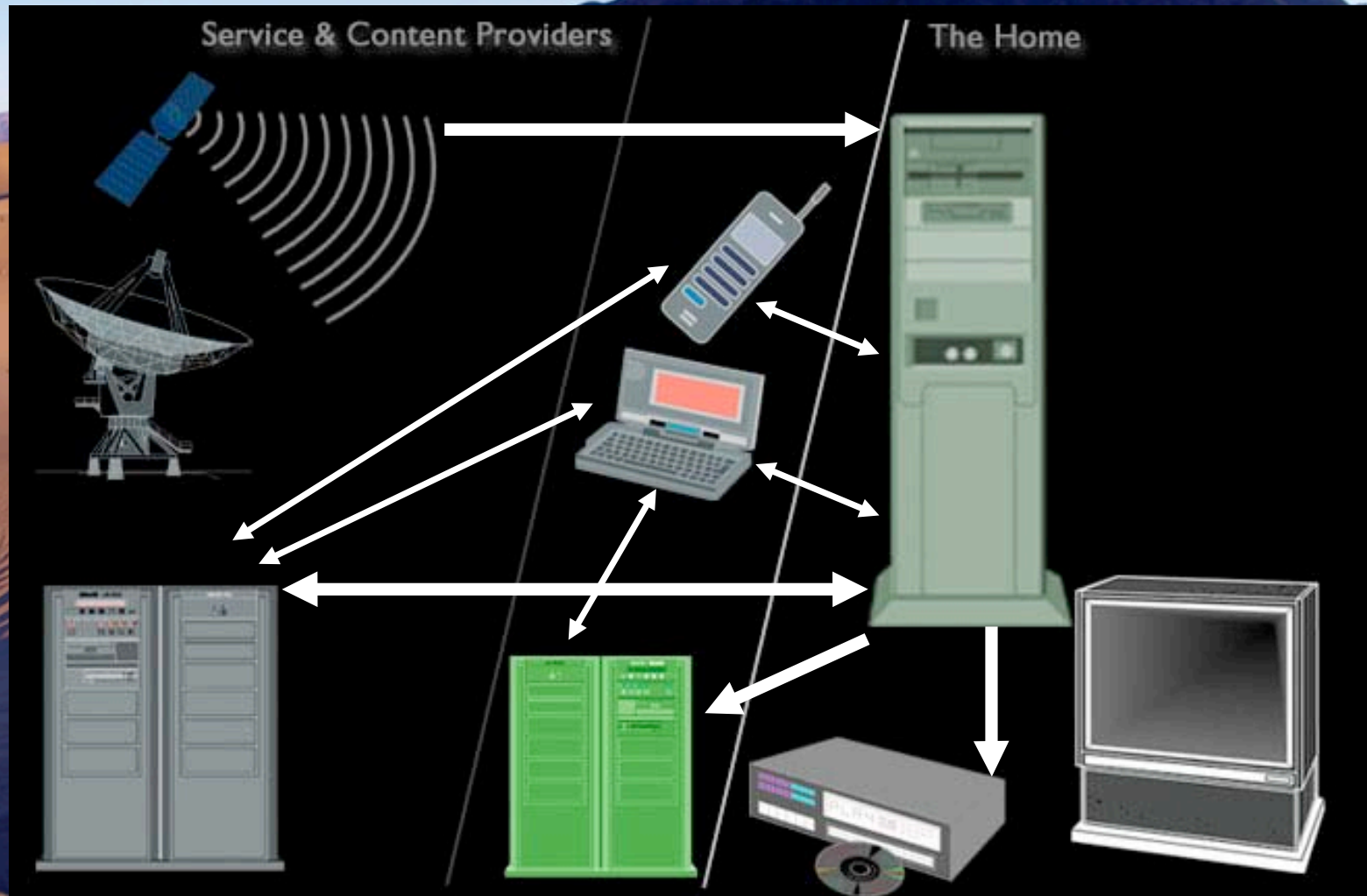
...and you know that it's right. NEW CHALLENGES

"We don't see things as they are,
we see them as we are" - Anais Nin

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...and you know that it's right. NEW CHALLENGES



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...and you know that it's right. NEW CHALLENGES

What is Personalised media?

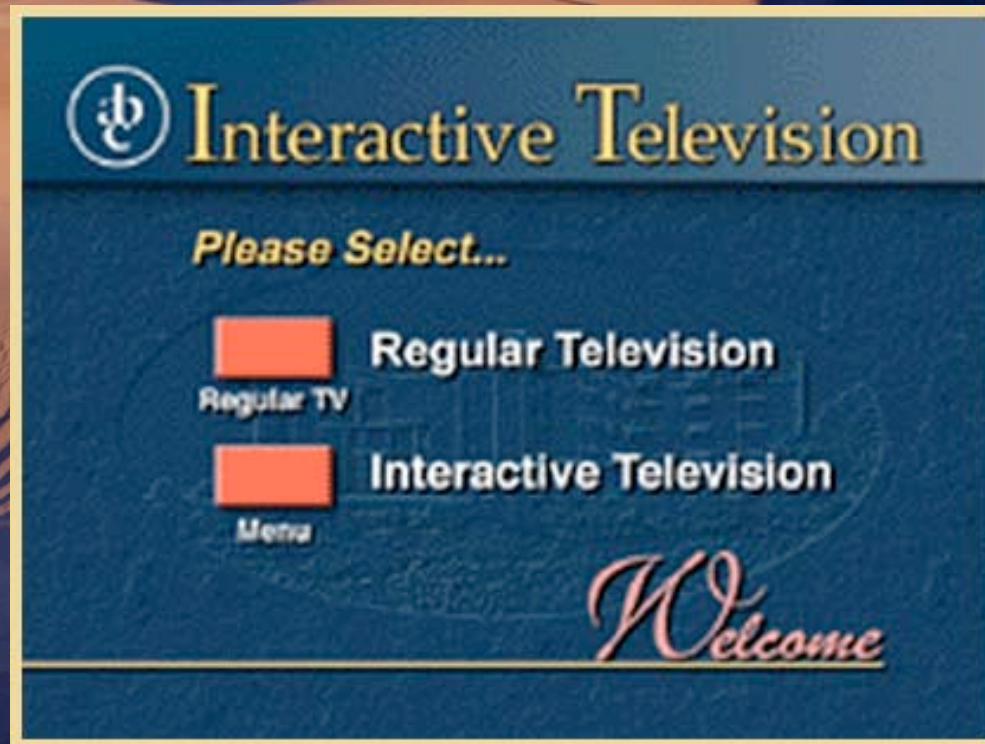
"the media industry will need to know each of it's viewers, personally"

- SEARCH - the "big filter", agents of choice on a hundred billion available items
- CONTENT - MyNetwork, MyExperience, MyLife media on any device
- PRESENTATION - How you get to it? Interface
- RECOMMENDATION combined with OPT OUT

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...and you know that it's right. NEW CHALLENGES

- Viewer confusion as rich media interfaces increase.
- We need mature usability personalisation.



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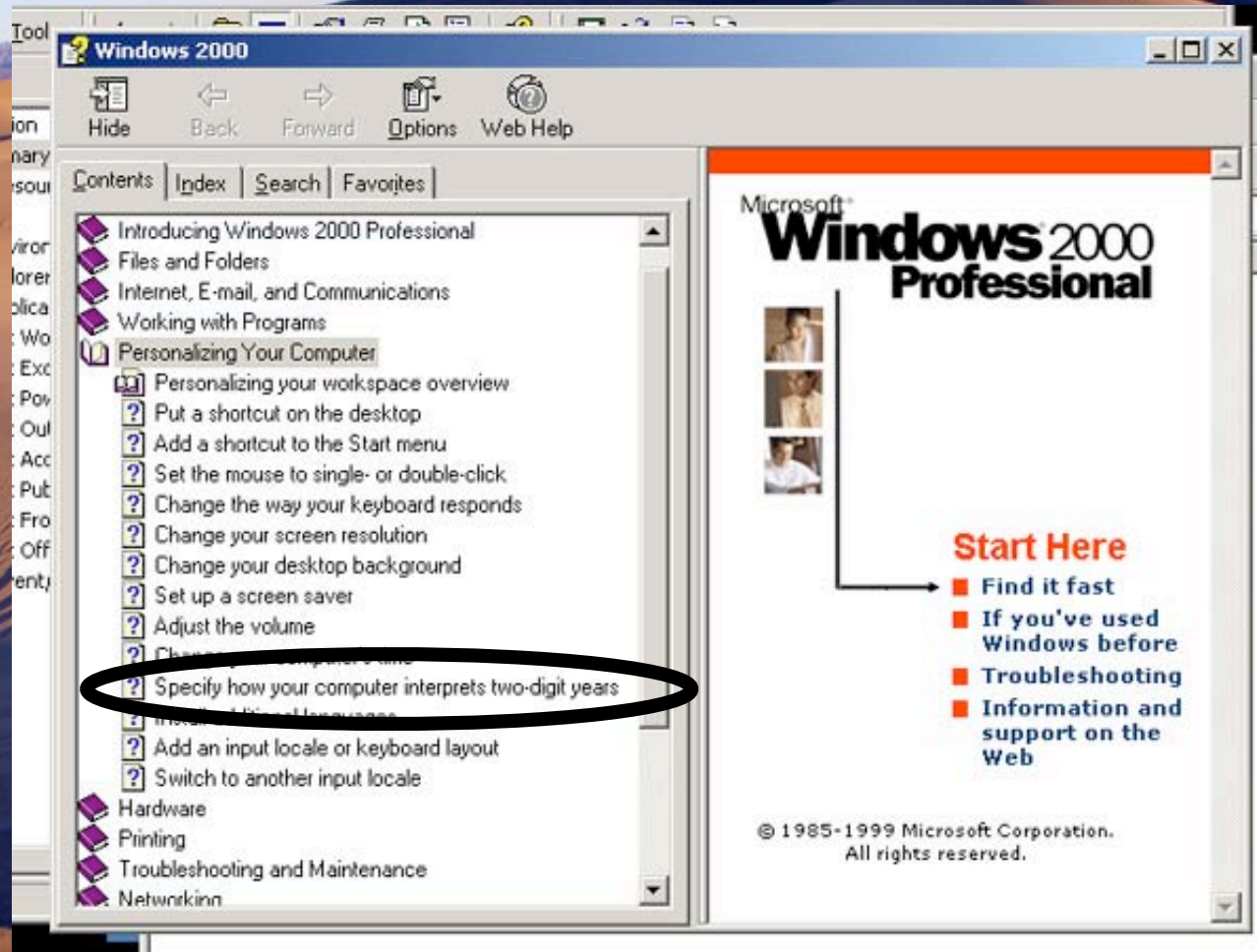
...and you know that it's right. NEW CHALLENGES

- As the cost of transporting video over the internet has gone from \$30 US to \$1 per GB
- There will be too much content to choose from
- The new business battleground will be for rich agent based personalisation
- Internet personalisation models such as Amazon and iTunes are crude foundations

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...and you know that it's right. NEW CHALLENGES

This is NOT effective personalisation



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...and you know that it's right. NEW CHALLENGES

This is not effective search

Google Web Images Groups News Froogle more »

"Film to make me happy" Search [Advanced Search](#) [Preferences](#)

Web Results 1 - 9 of about 11 for "**Film**"

[CriminyPete.Com - Nurse Betty](#)
... I wasn't enraptured by it or anything, but there was enough originality in the **film to make me happy** about it. I'd recommend it. ...
www.criminypete.com/nursebetty.html - 4k - [Cached](#) - [Similar pages](#)

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[News Archive January 2003](#)

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...and you know that it's right. NEW CHALLENGES

The search engine's dominance will continue for a while

- 1.2 billion searches in May 04 by Americans (IT facts)
- 28% for product names, 24% for local content (megaview)
- The first 10 sites in a search are visited 78% more than the next 20
- Paid search will grow from \$2.6 bill to \$5.5 billion in 09 (forester)

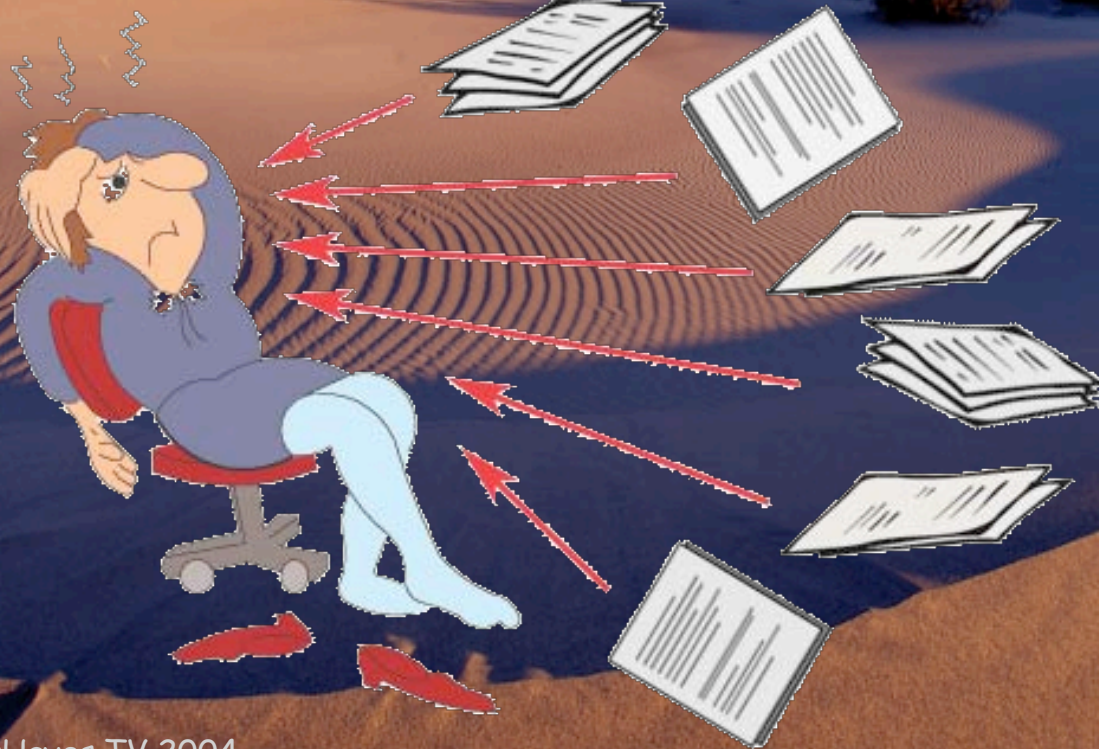
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...and you know that it's right. NEW CHALLENGES

personalisation & profiles - the world now

Loyalty cards - 78% of people have more than one, some have 37!

"What doesn't work anymore is treating all customers alike."
(DoubleClick Data)



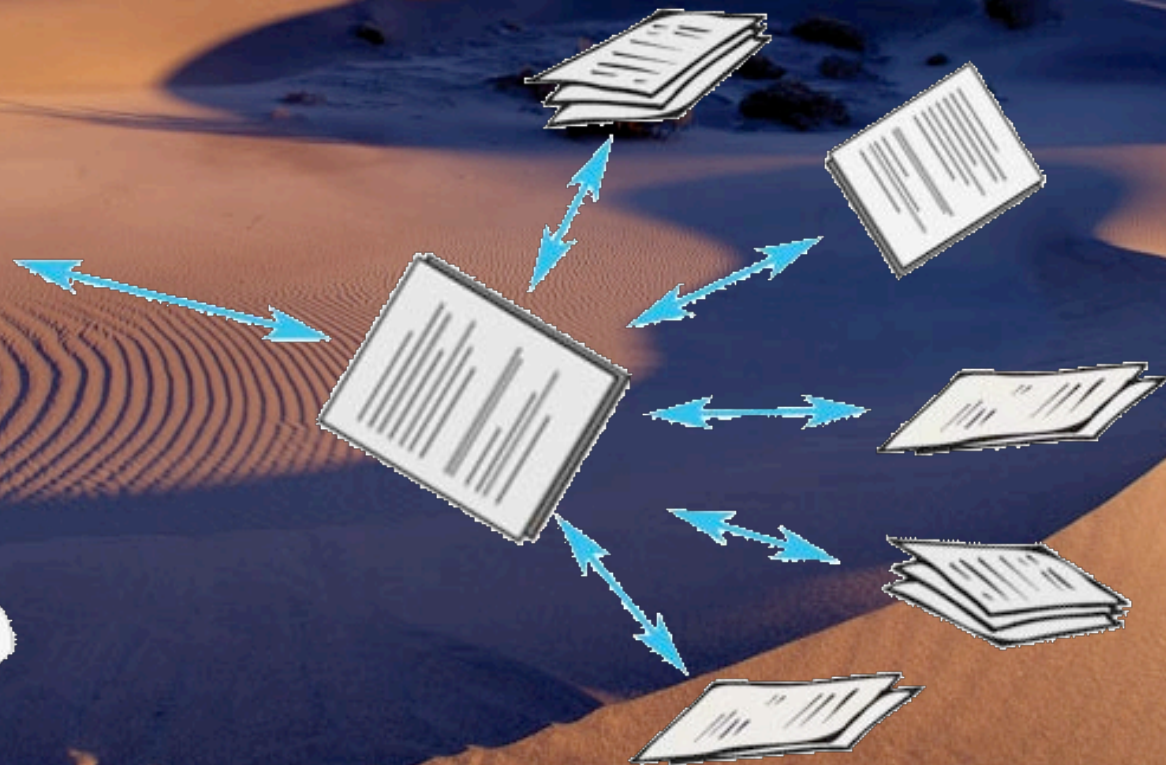
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personalisation - the ideal world

Interoperability between CRM profile systems



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...and you know that it's right. NEW CHALLENGES

THE CHALLENGES

- CONTENT - "You don't tag it then it doesn't exist!"
- EXPERIENCE - Global profile standards for portability and protection
- BALANCE - "viewers need to feel they are in total control AND also implicitly trust their agents to get good content"
- Serendipity AND making relevant empowering content



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Choices dam choices. The future:

Ubiquitous broadband TV is dominated by:

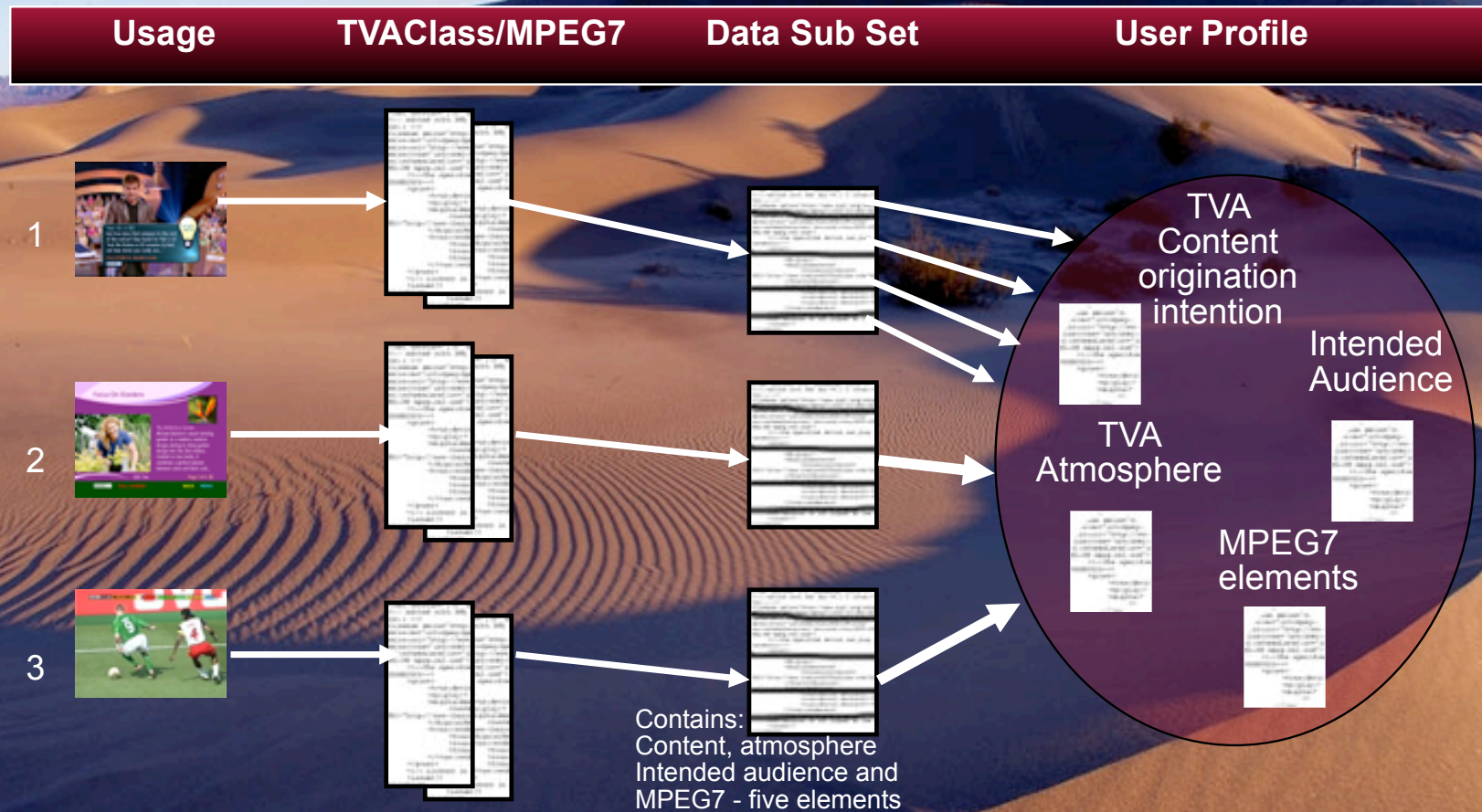
- Limited & fragmented content via confusing interfaces
- Hundreds of generic video banner ads and vMail spam

Or

- Relevant globally ready content with interoperable DRM
- Usable Personalised interfaces and portable, protected profiles

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...and you know that it's right. NEW CHALLENGES



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Getting it right leads to tremendous opportunities

- Broadcast Targeting - Tagging content to be 'effectively' matched to viewers
- Usage reporting - critical for the new advertising models
- Content tracking - over globalized two way broadband environments, tracking content usage and generating payments
- For the viewer the combination of personally relevant content, transportable profile and total control
- LET'S WORK TOGETHER TO GET IT TOGETHER!

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...and you know that it's right

- Thank you
- mail@garyhayes.tv
- QUESTIONS?