Personal Television Services

“Overcoming the challenges of integrating personalised television services with linear programming”

Gary Hayes
Senior Development Producer, BBC Interactive Television
And Chair of TV-Anytime Business Models
Personal Television Services

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?
Personal Television Services

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
Personal Television Services

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
Personal Television Services

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...
Personal Television Services

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
Personal Television Services

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
Personal Television Services

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

Gary Hayes, BBC
Personal Television Services

**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
Personal Television Services

**ENHANCED LINEAR PROGRAMMES ARE BETTER**

- Enhanced 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

BBC New Media      Gary Hayes, BBC      Forum Hotel 14/12/2000
Personal Television Services

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
Personal Television Services

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
Personal Television Services

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??
Targeted advertising
we now know who is out there
individuals appreciate relevance
the ad is way more effective

Ad-free or ad-free

Dynamic Insertion
Ads can ‘drop’ into relevant content and viewers

Guaranteed
eg: Coke buys 25 non-skippable impressions for every PDR on the market

Virtual ad channels
viewers choose to go to relevant ad channels

Infomercials
extending the short form ad.
Greater detail

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

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

Story lines - repeat viewings
Created via stored ‘soap operas’

Topicality
ad updating of commercials on the PDR to retain timeliness

Direct response
instant eCommerce gratification

Flexible length
Ads can now be any duration!

Ad positioning
1 Single ads linked to multiple genre programmes
2 Commercial exclusivity - one sponsor has ‘dynamic’ sole placement
3 Effective clustering of ads at beginning and ends of programmes
4 View the programme with the default advertisements being replaced with ads from the local store

Dynamic Insertion
Ads can ‘drop’ into relevant content and viewers

Infomercials
extending the short form ad.
Greater detail