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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Top 6 countries - highest internet penetration

- Sweden: 75.0%
- Hong Kong: 56.3%
- USA: 37.5%
- Iceland: 56.3%
- Netherlands: 37.5%
- Australia: 18.8%

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- MOBILITY - 190 million cell users in USA alone
- DISTRIBUTION - Digital Television Ubiquitous
- STORAGE - PVR's 41% penetration by 2008 (forester). 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

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

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Percentage broadband users who download films

- Korea: 60%
- Germany: 45%
- USA 2004: 30%
- UK: 15%
- Australia: 15%

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...the revolution’s here - the BBC in 2003
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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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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- 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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“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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- Viewer confusion as rich media interfaces increase.
- We need mature usability personalisation.
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.

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

This is NOT effective personalisation

2 Specify how your computer interprets two-digit years
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...and you know that it's right. NEW CHALLENGES

This is not effective search

Google search results for "Film to make me happy"
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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classification & 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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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

Usage | TVAClass/MPEG7 | Data Sub Set | User Profile

1

2

3

Contains: Content, atmosphere, Intended audience and MPEG7 - five elements

TVA
Content origination
Intention

TVA
Atmosphere

Intended Audience

MPEG7 elements
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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

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QUESTIONS?