



The Future of 'Converged' and On-Demand Television: Early Evidence from Actual Consumer Behaviour

1400-1900, Tuesday July 7, 2009 at London Business School

For over 15 years, the digerati have predicted imminent revolutionary change in TV viewing behaviour. So far, they have been consistently wrong, but we now have 60% UK broadband penetration and a range of competing technologies and services supporting 'converged' and ondemand TV. Will predictions of revolutionary change at last be proved right? This conference explores the early evidence from actual consumer behaviour – both adoption and usage -in the UK and USA. The emphasis is on short presentations based on recent, reliable data (ie not surveys of claimed or intended behaviour) plus expert panel discussions.

Programme

1400: Patrick Barwise, Emeritus Professor, London Business School

Introduction and background

Introduction to the conference. Definitions: convergence, video on demand. Previous predictions and where we are today. The UK policy context.

1415: Tony Wearn, Research Director, BARB

PVR adoption and the impact on viewing

The growth of PVR ownership and the extent to which this has (or has not) increased the average level of timeshift viewing (i.e. is the growth in timeshift purely a reflection of PVR growth or are viewing habits between live and timeshift actually changing?)

1430: Helen Normoyle, Head of Audiences, BBC

BBC iPlayer: Changing the way we watch?

Since the launch of the PC iPlayer it has received more than 250 million TV play requests and built a daily usage of around 500,000 individuals in the UK. So who is leading the way with online viewing? What does it mean for linear TV? And what do the current users view?

14:45 Dr Toby Syfret, Television Analyst, Enders Analysis

Adoption and usage of VOD: Initial evidence and some implications for broadcasters and advertisers

The TV advertising industry is already in a state of crisis due to the recession and structural changes associated with the switch to digital. Whilst the switch to digital broadcast reception is almost complete, the shift to nonlinear alternatives has a long way to go, raising the prospect of further structural change and damage to the old world linear broadcast model. In fact, all the evidence suggests that the non-linear on demand world will take a very long time in coming and there are grounds for thinking. 'If only it could come a little quicker', as that might counter some of the deflationary pressure caused by the growing over-supply of advertising eyeballs.

1500: Panel 1 Discussant: **Mark Oliver**, CEO, Oliver & Ohlbaum Associates Ltd

1520: BREAK

1545: Michael Link, Chief Methodologist/Vice President Methodological

Research at The Nielsen Company, USA

Video Consumer Mapping Study

Results of the \$3.5 million year-long Video Consumer Mapping study conducted by the Council for Research Excellence, in which participants' media consumption was directly observed and recorded using handheld smart keyboards equipped with a custom media collector programme

1600: Sarah Pearson, Managing Partner, ACB

Impact of converged TV technology on actual audience behaviour – 1-3-9 Media Lab

1-3-9 was an industry-led longitudinal study that used video ethnography to look at day-to-day viewing behaviour

with a range of 'converged' technologies over 18 months. The results suggest that big channels are here to stay but in combination with non-traditional technologies, content and behaviours. In particular, the research explores the complementarity of the main TV set and the PC/laptop for viewing video content.

1615: Julian Dickens, 3 Reasons Ltd

The impact of TV 2.0 on viewing behaviour: Some early data, and a hypothesis.

TV 2.0 is an overwhelmingly primary set phenomenon. The relative quality of the viewing experience on secondary sets has deteriorated and will take many years to catch up. The presentation will report some early data on the impact on viewing within the home and some thoughts about possible future implications.

1630: Belinda Beeftink, Senior Research Manager, IPA

Multimedia/multitasking -Latest insights from IPA Touchpoints

Using the IPA TouchPoints survey we will show how people are multitasking and in particular multimedia tasking more and more these days. Are there particular times when this multitasking is more prevalent?. Do we multitask more at home during a busy working day? When are we very definitely not multitasking? Which media deliver "solus" media time the best and when? What is the share of media day? How does all of this differ by target market?

1645: Panel 2 Discussant: **Claire Enders**, CEO, Enders Analysis

1705: BREAK

1730: Claire Grimmond, Controller, Research and Insight, Channel 4

Evidence from Channel 4 Data and BARB on the hierarchy of content choice

Evidence from Channel 4 data and BARB on how viewers are developing different hierarchies in how they make choices around on-demand content.

1745: Julia Lamaison, Research Director, GfK

Changing patterns of viewer behaviour – what does this mean for the production of visual content?

How are producers responding to the multi-platform environment and what does it mean for the future development of content

1800: Pat Dunbar Director, Advertising, Microsoft Corporation, USA

Is Zoetrope an ad skipping method that is good for users and advertisers?

Zoetrope is a new Microsoft system that creates a frame-based fast-forward which enables viewers to skip from segment to segment. This provides a better user experience while making the ads still recognizable. Could this be a way to solve the challenge of continuing to fund content from ad revenue while allowing viewers to fast forward?

1815: Neil Mortensen, Research Director, Opera Media (Omnicom)

A media agency view: Managing the relationships between brands and consumers in a converging world

What market scenarios are we facing as each medium evolves over the next 3-5 years? What will be more and less important in the future? Is the slow pace of change of media measurement curbing the benefits of the digital revolution? How will converging platforms affect the way that media space is traded in the future?

1830: Panel 3 and final discussion Discussant: **Peter Phillips**, Partner, Strategy & Market Developments, Ofcom

1900: END – drinks