



Ipsos Connect

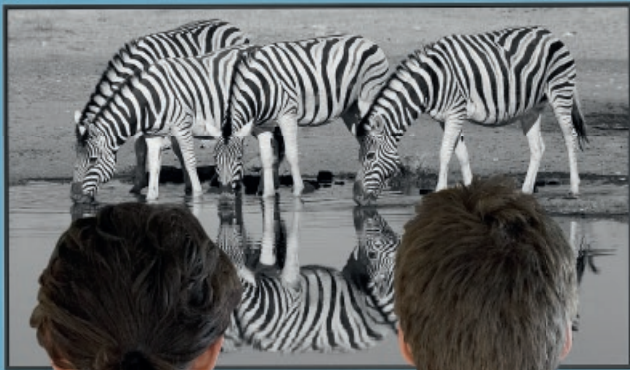


FUTURE OF TV

**THE EVOLUTION OF
TV EVERYWHERE**

Thought Piece
2016

THE TELEVISION SET HAS LONG SINCE BEEN A STALWART OF OUR LIVING ROOMS; A TRUSTED FRIEND WITH WHOM WE HAVE SHARED SOME OF THE NATION'S GREATEST MOMENTS; A SOURCE OF ENTERTAINMENT, KNOWLEDGE AND INSPIRATION DATING BACK TO BEFORE WORLD WAR II. YET TELEVISION IS FAR FROM READY TO DON ITS PIPE AND SLIPPERS AND LEAVE IT TO THE YOUNG GUNS.



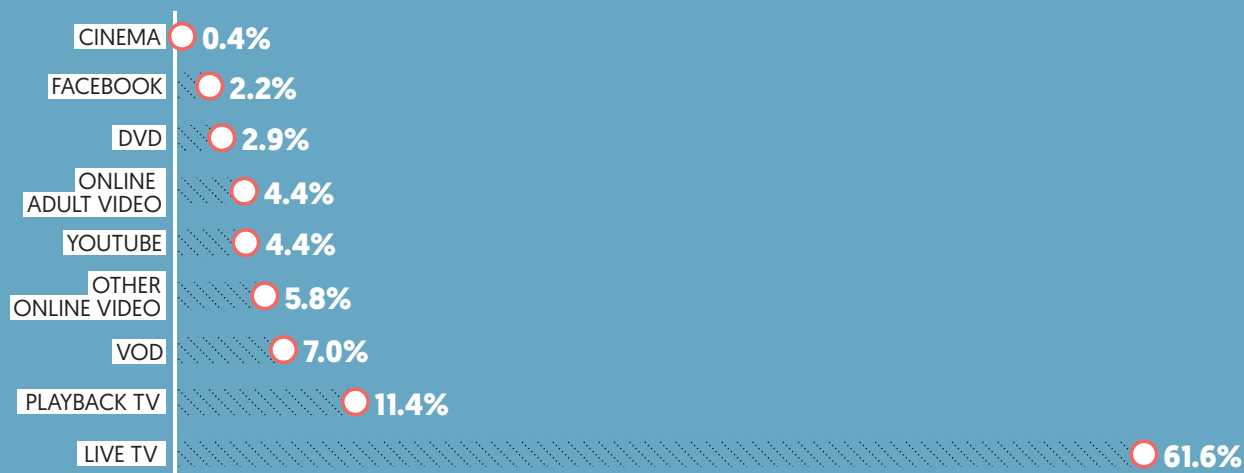
In fact, as technology and audience expectations have evolved, television has proven itself a master of reinvention; the black and white box has grown in stature, connected, digitalised and embraced on demand. As new platforms have emerged, television has successfully collaborated housing social, video and audio players to provide a household entertainment hub that remains relevant to audiences today.

As a nation we love TV! Personally, I love the anticipation of a new gritty drama, the outrage of the latest reality outburst, the common point of reference with my family, friends and acquaintances. But equally, I also love radio, print, the internet and social media (I've got the media bug). I love the way that they each fit into my life at the times when I need them most, and that collectively they give me everything I need; the quick update, the 'me' time, the switch off, the switch on. Whilst of course I am not ignorant to the competition between media largely driven by the pursuit of advertising revenue, thinking purely as an audience member, I love it most of all when they work together [for me].

AUDIENCES ALREADY SPEND TIME WITH A WIDE RANGE OF VIDEO CONTENT EVERY DAY

[THINKBOX RECENTLY RELEASED THE FOLLOWING BREAKDOWN OF DAILY TIME SPENT WITH VIDEO]

Source: 2015, BARB / comScore / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 6 / Rentrak



This brings me on to the future of television and content (despite much speculation, I am absolutely certain that television does have a future, and a healthy one at that). Greater personalisation and more seamless content delivery across screens are key themes that are already influencing TV strategy, but which we at Ipsos Connect anticipate gathering pace. Whilst we believe the TV screen will remain fundamental, we expect demand for a more harmonised, multi-screen content consumption experience to continually grow. Far from the divisive first / second screen debate so often mooted today, audiences will be best served when media,

screens and devices collaborate, to optimise reach, experience and the impact of both programme content and advertising.

AS A NATION WE LOVE TV!

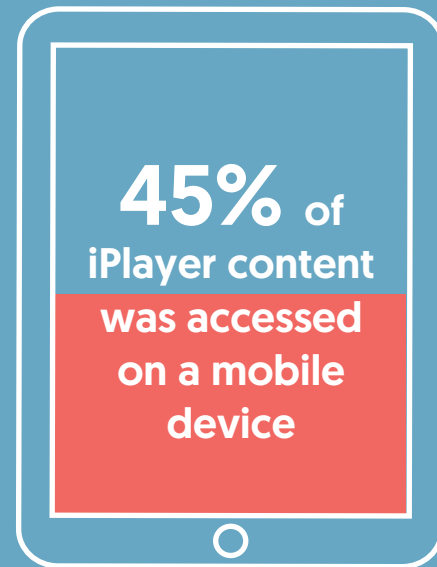
SO WHAT IS HAPPENING TODAY?

TV companies are already investing heavily in the optimisation of their delivery of programme content and advertisement across multiple devices; this is nothing new. Channel 4 launched their digital hub as a way of offering on demand and future content while SkyQ offers "Fluid viewing", a way for consumers to have their content follow them on their various journeys across devices and screens both in and out of home.

In December 2015, 45% of all iPlayer requests (TV and radio programmes) came from a mobile device [Source: BBC iPlayer Monthly Performance Pack]. This is all fantastic stuff for me as a consumer; a step away from the frustration of having time to kill and not having my favourite programmes recorded at my family home when they're all sat waiting to be viewed back at my flat; a solution to missing 5 minutes of the match on TV because my husband refuses to pause it and I need to put the dinner on. Ok, so these might not be huge problems in the grand scheme of things but they're significant to me and they're certainly problematic to advertisers who are likely missing out on valuable exposures.

Focusing more specifically on advertising opportunities, ITV's AdSync+ (powered by Radium One) enables TV advertising to be extended to online audiences across multiple devices, based on their likes and behaviours. Sky AdVance uses audience data to identify who has (or hasn't) been exposed to specific campaigns across different platforms, so that targeted advertising can be served to the most relevant audiences. These are exceptionally powerful developments for TV advertising, enabling more efficient targeting of relevant audiences for reduced wastage and enhanced engagement.

Going forward, we believe that the interplay between different screens will become even more



sophisticated, powerful and seamless for the user, providing further exciting opportunities for advertisers:

CONTENT THAT FOLLOWS YOU

Imagine a home where you leave your living room for your bedroom and the television automatically switches on as you enter, identifying you personally as the viewer and fixing on the channel you were watching before. Perhaps it isn't even a television set, but a connected screen integrated within your household furniture or white goods. These technologies are already in testing phase, to enhance the viewing experience, reduce interruption and increase opportunity to view advertising.

CONTENT INCREASINGLY ALIGNING WITH CONTEXT

It is inevitable that personalisation will not just be about matching ads to individuals based on demographics, preferences or previous exposure. It will also involve delivery of content that is targeted, relevant and optimised to their location, personal schedule, and their device, in recognition of the fact that individuals' needs, preferences and openness to brand messaging are in constant flux.

**TV WILL
BECOME A MORE
CONNECTED
EXPERIENCE**

engaging viewing experience that involves audiences in the stories themselves.

On the whole TV will become a more immersive, connected experience that will be targeted to the individual not just in terms of advertising content but as a whole viewing experience. However, as this begins to happen it poses a challenge both for content and advertising producers as well as researchers.

MORE IMMERSIVE EXPERIENCES ACROSS DEVICES

Multi-screening will provide a valuable opportunity for complementary and additive content across different screens, both in advertising and in programming, so that they work together to an even greater extent than we've seen to date. This could involve stories progressing across different screens (e.g. in a crime drama you could witness scenes across different locations taking place at the same time) or viewers being able to find out more about products or brands viewed on their TV screen, by prodding and questioning characters on another device, with the aim of creating a more immersive and

- 1. Understanding need states across different platforms at certain times:** Programmatic is already rising and will play an increasingly important role in TV advertising in the future.



As TV becomes more immersive and the interplay between different screens continues to evolve, advertisers will gain more opportunity to communicate brand messages to audiences via video, at any point in time, as part of a more integrated campaign. This also means that they are faced with the fundamental challenge of understanding whether their advertisement covers their audiences' needs at any particular time and on any given device. Without this understanding, programmatic cannot be effectively implemented. In the moment, mobile diaries, where audiences can be researched via their smartphones at the times when advertising is consumed, allow us to provide advertisers with an in-depth view into audiences' needs and whether an advertisement has fulfilled or tuned into those needs effectively.

- 2. Reaching the right audience:** As content moves across devices (which are often shared with other people in a household), and is interacted with in different ways, keeping track of who is exposed to what version of their ad, and where, will become increasingly complex. With the rise of programmatic this is particularly problematic as it means that the targeted brand message might not be reaching the right audience. In addition, from

an audience point of view, it may become more difficult for them to recall the source and nature of their exposure. Passive measurement tools such as MediaCell for Advertisers (MFA) can help with this. They utilise smartphones, which are the device most personal to us and thereby most likely to be with us at all times, to passively identify and measure what advertisement we are exposed to via what screens, and when.

- 3. Optimising content as a campaign runs:** As TV becomes more immersive consumers will expect the same from advertisements, which in turn means that advertisers need to be constantly innovative in their approach to communicating a brand message. At the same time advertisers are trying to personalise their message to ensure they have the optimal effect on their target audience. It will become important to be able test whether a brand message has been effectively communicated in the moment and within the right contextual environment.

Options like MFA will allow brands to contact their consumers in the moment – while or straight after they have been exposed to an advertisement – allowing them to get more accurate feedback after they have been exposed to it in their natural environment.

**MEDIA
FOCUS ON
COLLABORATION
RATHER THAN
DIVIDE**

IN SUMMARY

Television has faced numerous challenges over many years but has always come out fighting. We believe it will continue to play a key role for audiences and advertising for many years to come. However, the boundaries between devices and screens will become ever more blurry, as appetite and demand for video content continues to grow. Within this environment, audiences will be best served when media focus on collaboration rather than divide. Through provision of engaging, personalised journeys across screens, advertisers can ensure they reach audiences at the moments that matter most, serving content relevant to individuals and their needs, whilst also facilitating deeper and more meaningful interactions that are optimised for each media.

Unpicking these more tailored experiences and assigning value to each touchpoint will become an even greater challenge for research than it is today, but it's one that we're up for and we are continually developing ideas and creative approaches to tackle the exciting questions that advances in technology pose for media research. MFA is just one example of this. Please get in touch if you would like to find out more.

Television has faced numerous challenges over many years but has always come out fighting.

**FOR MORE INFORMATION,
PLEASE CONTACT:**

**SENIOR DIRECTOR
& HEAD OF MEDIA**



Beckie is Senior Director and Head of Media at Ipsos Connect. She is a research buff who is fascinated by changes in methodology and, in particular, how technology can be better used to identify and understand audiences, needs and behaviours, to help clients make better business decisions.

Beckie Goodfield
Beckie.goodfield@ipsos.com
+44 (0)7800 675933



Ipsos Connect

ABOUT IPSOS CONNECT

Ipsos Connect are experts in brand, media, content and communications research. We help brands and media owners to reach and engage audiences in today's hyper-competitive media environment.

Our services include:

- **Brand & Campaign Performance:** Evaluation and optimisation of in-market activities to drive communications effectiveness and brand growth.
- **Content and Communications Development:** Communications, content and creative development from early stage idea development through to quantitative pre-testing alongside media & touchpoint planning.
- **Media Measurement:** Audience measurement and understanding.

Ipsos Connect are specialists in people-based insight, employing qualitative and quantitative techniques including surveys, neuro, observation, social media and other data sources. Our philosophy and framework centre on building successful businesses through understanding brands, media, content and communications at the point of impact with people.

