

Personalisation Roundtable Summary

The TV transformers project serves to support and guide the TV industry to make best use of disruptive technologies. The second in the project's series of roundtables focused on Personalisation.

The purpose of the DTG roundtable event was to understand, from the perspectives of different players in the TV ecosystem (broadcasters, equipment manufacturers, telcos, mobile operators, and networks), the range of concerns, challenges and opportunities in relation to Personalisation for the future of TV.

Personalisation, of content and advertising, will transform consumer media consumption experiences and offer exciting opportunities for the industry. For the consumer, there are both risks and advantages arising from personalisation. For different parts of the industry, personalisation capabilities vary dependent on access to audience data. Similarly, mechanisms to advertise vary. For example, YouTube allows viewers to skip their adverts, Netflix is subscription based and does not use advertising, and traditional linear broadcasting gives the consumer no choice over watching adverts.

Key goals of the roundtable were: to understand the direction(s) of travel of the TV industry, with regard to personalisation, and possible research and development foci and/or approaches to enable the TV value chain to explore and innovate further with personalisation.

Over summer 2018, i2 media research worked with DTG to review industry, academic, professional and consumer literature and sources to identify consistent key themes in relation to these questions in a Background Review. The areas covered in the review spanned: customer (viewer) expectations, industry expectations, ethics, and key technologies. The Background Review was discussed in a few personal interviews, prior to advance circulation to the Roundtable attendees, to read and reflect on prior to the Roundtable.

24 professionals comprised mainly of members of DTG Council, across all sectors in the TV ecosystem attended the Roundtable. Following a short summary of the Background Review from Professor Jonny Freeman attendees were tasked, in breakout groups of 6-7, to consider the benefits and disadvantages of personalised

content and advertising for the consumer and for industry, with a focus on: key issues, TV use cases requiring personalisation, and possible/necessary next steps towards advancing personalisation in TV.

A rapporteur from each breakout presented their groups findings back to the plenary.

Following the event, i2media research have produced the (DRAFT) synthesis below identifying recurrent themes (Insights) and recommended next steps (So What?) to enable the UK's TV ecosystem to successfully capitalise on the benefits and opportunities of personalisation into the future.

Insights

Linear TV ecosystem is relatively independent of personalisation

There was broad consensus across the breakout groups that the current models in broadcasting do not depend extensively on personalisation. Content for TV channels is commissioned and scheduled according to measured variability (in demographics, on a household level) in viewing behaviours targeted, and the targeting on a very large scale of advertising to specific demographics is supported through alignment with content and channels.

- Commercial broadcasters emphasised that they do not foresee this changing radically in the immediate timescale.

Targeting vs. Tailoring: avoiding the echo chamber

An interesting distinction was drawn between 'targeted' and 'tailored' personalisation, delineating content recommendations for a specific individual's tastes and state, and more general cohort specific recommendations. There was a general consensus that for TV content, more specific recommendations based on an individual's tastes and state is not necessary and carries risks. Specific risks raised included:

- viewers losing opportunities to discover content serendipitously, and
- the amplification of the 'echo chambers' of people's social media feeds.

Personalisation can help consumers find relevant content

There was general recognition that personalised recommendations can help viewers find content that they will enjoy, with the personalisation algorithms used by Netflix, Amazon Prime, YouTube and others seen as essential to deliver such recommendations. Whilst some TV platforms were recognised as experimenting in this space, e.g., BBC iPlayer, issues were raised regarding key differences between traditional TV consumption, and consumption of OTT/online video providers. Specifically:

- TV (especially the horizontal market), does not have enough meta data (on viewers) to enable these levels of personalisation; and
- TV, at home, is much more often a shared viewing experience – and it is not necessarily possible to personalise to all viewers of a shared experience simultaneously.
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Innovation is likely to be driven by advertising

The groups formed a consensus that advertising is likely to be the route through which more personalisation would likely emerge in the traditional TV environment. However, against this position are two key insights:

- Commercial broadcasters are happy with their current model, and
- Well-resourced non-commercial broadcasters are conducting extensive R&D with regard to personalised recommendations.

So what?

The roundtable discussions have informed two recommended next steps to support the TV ecosystem in best realising the potential benefits of personalisation. Both require investment.

1. *Development of a unified/collaborative user id/personalization infrastructure*
2. *Exploiting the low intrusiveness of the TV model of targeting as an (ethical) benefit/ advantage*
3. *Consider questions of PSB prominence in a hyper-personalised environment*
4. *R&D on a user-controlled profile – share preferences on a per service basis*
5. *Consider questions of PSB prominence in a hyper-personalised environment*
6. *Understanding video content audiences collaboratively, across broadcast and online*

Exploring further

It is advised that a further workshop take place to build on the initial findings.

- ***SWOT Analysis of current viewer experience***
- ***Identify beneficial data to collect***
- ***Discuss how data can be collected, stored and shared***
- ***Explore data use cases***