

2024:
THE
FUTURE
OF
TELEVISION



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Edited by Zoë Clapp

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Foreword
Darren Childs



“This book assembles a collection of views from brilliant thinkers from both TV and social media. They don’t all agree, and you may not agree with them, but they make us aware of the challenges ahead.”

The fast-growing commercial television network, UKTV is a joint venture between BBC Worldwide and Scripps Networks Interactive. Its CEO, Darren Childs is not afraid of the future. He has been at the forefront of fast changing media throughout his career spanning America, Asia and Europe. In commissioning these thought leadership essays, Darren hopes we can gain insight into different potential futures facing broadcasting over the next ten years.

Ten years ago, media journalism said that television was as good as dead, that we were going the way of the record industry, fatally wounded by the digitalisation of content and the rollout of broadband networks.

But a decade is a long time in television and every single metric that crosses my desk now shows that digitalisation of content has made it even easier for people to consume more good television. Instead of new media cannibalising the TV business, broadcasters have found they can use technology to great commercial advantage. Yes, people do watch a lot of content online and that will increase over time, but a great deal of that is about watching their favourite broadcast shows in a convenient format, at a convenient time and location. The facts show that, in addition to their new online TV diet and binging on box sets, people are watching *even more* linear scheduled television.

Statistics show that, in addition to their new online TV diet and binging on box sets, people are watching even more linear scheduled television.

Not only has the TV industry met the digitalization challenge, it has also raised our creative game: I would argue that, as viewers, we are spoiled for choice and quality at a level never before known.

The TV ecology is becoming more dynamic and democratic than ever before: as broadcasters we can propagate programmes online and On Demand, and if we can catch the viewers’ attention, they will be discussed and recommended by thousands of people on social networks in real time, becoming instantly accessible by new viewers.

Long-form video content is still very much in television’s hands, and even though Video On Demand (VOD) viewing will certainly increase, there are more reasons than ever to be optimistic about the future of broadcast, as these essays show.

That's not to say we can afford complacency. The landscape has changed massively since our first futures book was published, and it will change massively again in the next ten years. This book assembles a collection of views from nine brilliant thinkers from both TV and social media. They don't all agree, and you may not agree with them, but they do make us aware of the challenges ahead. Ubiquitous broadband networks, as they roll out around the planet, imply ubiquitous content, liberated from the TV set in the corner of your living room. The generation after ours will have grown up with access to content wherever, whenever, and on whatever device they want – and it's that generation which particularly interests me. Tomorrow's television needs tomorrow people. For a wake-up call, dip into **Dave Evans's** essay. As Chief Futurist for Cisco, his mind conjures strange and startling visions – like television coating every wall of your home.

There are a number of common themes that emerge from other contributors. Will a multiplicity of new online channels threaten broadcast TV's dominance? **Justin Gaynor**, formerly of ChannelFlip argues that anyone can start a channel, and that there is a huge untapped demand for more specialised video content which the broadcasters are unable to satisfy. He's right, but I'm not worried. As writer and producer **Tony Jordan** points out in his essay, the urge to be entertained is a primal human need. People love good storytelling, wherever and however they find it. Most TV channels have found that it is success in the drama genre which enables them to really start to pop, and that's where broadcast TV will continue to have the edge. I would argue that series stacking the PVR has contributed to the recent increase to drama viewership, because no longer do you need to commit to be in front of a TV at the same time each week to enjoy an unfolding series.

Television is a team sport like no other: I counted 119 separate contributors credited on a recent episode of *Doctor Who*, and that's before you even get to the team responsible for promotion and

transmission. So while a talented individual at home with a Mac can compose and produce a wonderful piece of music to be enjoyed by thousands or millions around the globe, it's much more difficult for lone traders to compete in high-end television production. While there's some fantastic and imaginative user-generated video content online, it tends to be shorter in form, and more lo-fi in production values than most broadcast programming. Let's face it, no one is going to make the next episode of *Downton Abbey* in their bedroom.

Those great television teams are built around a keystone that's rare and precious: writing and performing talent. Only a special few have the ability to connect with audiences and tell great stories, and they deserve to be highly rewarded for it. There's an old Hollywood adage that if you put money into the words and money into the people that speak the words, then the rest will take care of itself. Talent agent **Jon Thoday** offers us a robust analysis of where some broadcasters are going wrong, and calls for more investment in new talent.

Online can be a great place to spot innovation. Take TV magician **Dynamo**. He gained a following by making his own videos of his magic tricks and posting them on YouTube, as he tells us in his piece in this book. Indeed, the new factor is that today television is only one component of a star's career, the springboard that has given someone like Jamie Oliver the opportunity to build a portfolio of businesses, from DVDs to merchandising and restaurants. But there can be a point where a talented individual will benefit from having the weight of an industry behind them to break through globally and to their full potential. I'm proud that UKTV has had a part to play in Dynamo's success, by giving him his own series, *Magician Impossible*, on Watch.

The generation after ours will have grown up with access to content wherever, whenever, and on whatever device they want – and it's that generation which particularly interests me.

The other factor in Dynamo's success was the awesome rise of social media over the last decade. The buzz it creates helps outsiders break into previously closed worlds like television. But television is learning to harness the potential of social media, as Twitter's UK MD, **Bruce Daisley**, points out. More tweets equal more ratings, he says. Indeed broadcasters are borrowing from online technologies in all sorts of ways to enhance their business. **Dawn Airey** moved to Yahoo partly because she was fascinated by its ability to know and understand the individual user in so much more detail than any TV channel currently can. She argues that television's future requires a symbiosis with data-driven analytic companies like Yahoo and Google.

For me, the next question is what you will use that data for. Google probably has the best data on the planet, but as far as I know, it hasn't yet made a great television show. For that you need compelling storytellers, phenomenal visual artists, visionary producers and brilliant performers. Data is a powerful tool for monetising content, but that human skill of connecting won't ever be replaced by an algorithm.

Broadcast already has plenty of its own analytics, with overnights (supported by platform-driven data) being enough to give us a steer as to what people like or dislike. Perhaps Yahoo and Google can serve a targeted advertising market better than TV does at the moment, but even that is beginning to change and is an area of great interest for broadcasters already trialing targeted advertising, with ITV, Channel 4 and Sky currently working on solutions. As blinkbox's **Adrian Letts** points out, it's becoming harder to spot the borderlines between media and commerce.

I am also strongly swayed by independent producer **Liz Warner's** argument that television's future is bound up with its ability to attract talented recruits.

A key part of my job is making sure UKTV has the best people who will choose us over a job with some trendy digital start-up company. Television's future is no greater than its ability to continue to attract bright young talent to lead its evolution. The industry can't continue managing its business and its people in the same way it has for the last fifty years, or the next wave of talent will have no interest in working for us at all.

That means creating the right culture. Young people today have no time for bureaucratic environments and they're impatient to get somewhere fast. The old way, when television was the only game in town, was to make your new recruits serve a lengthy apprenticeship, bringing them in on the ground floor to work their way up. You certainly didn't pay them much as they started to build a career, assuming they were thick-skinned and determined enough to survive. Those methods won't get you the good people today, because there are too many competing opportunities. They want flexible working, rather than rigid nine-to-five; they want portable technology so they can work from different locations; they want a fast-track, to be given responsibility and accountability much earlier in their careers than used to be the case twenty years ago; and most importantly, they want to share their passion and belief for the purpose of your organisation. So top of the list for broadcasters is the need to put in place excellent managers and leaders willing to take responsibility for developing people's careers and making TV's future an exciting one.

In the great scheme of things, UKTV is David versus the Goliath of the big public service broadcasters, and I want us to have the same energy as an internet start-up. We have to be nimble and highly innovative, not just in our content but in every single aspect of how the business is run, in every single process, in every single decision. That gives us a real competitive advantage over some of the more

To me, an essential point is that future technology and future content are two different debates.

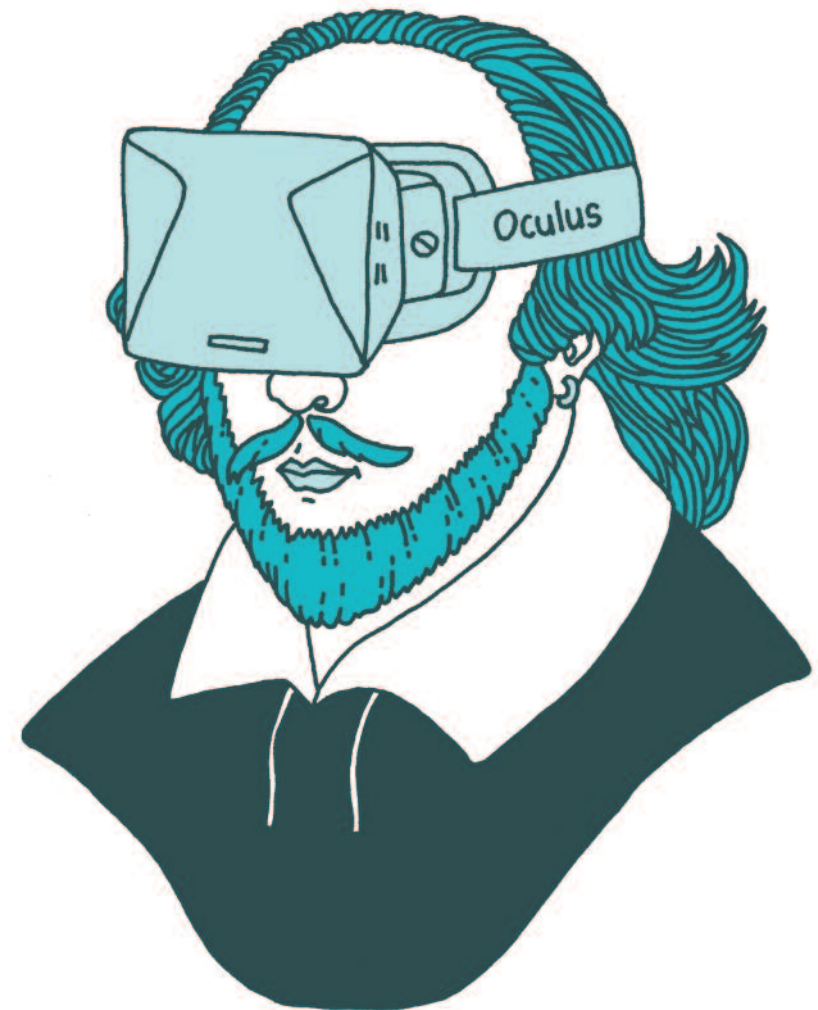
Predictions from a Chief Futurist Dave Evans

established broadcasters. During my time working in America, I saw how once they started to put money into content and innovation, cable and satellite channels were able to take significant market share away from the incumbents, and one of the reasons UKTV has been successful over its 21 year history is that it has constantly innovated, and has not been scared to add new services and new channels, to pioneer the aggressive rebranding of successful channels at a time when most broadcasters would have just sat back and carried on as they always had. This ability to repeatedly reinvent ourselves is what will keep us on the front foot in future.

Ten years ago, digital models were seen as a threat to revenue but there is now a successful commercial model behind every way of distributing content, bar pirating. Who cares where people watch? Whether it's advertiser-funded VOD, transactional VOD, subscription viewing, on phones, on tablets, on any platform whatsoever, so long as we can get people's attention with great content, we have found a way to get commercial benefit.

To me, an essential point is that future technology and future content are two different debates. Technology is the enabler for people to find the content they want (and tell others about it, via social media) but technology can't by itself create good content. People will still demand high standards in what they watch and if anything, consumers are demanding to be challenged more editorially, and that's where the broadcast industry will continue to have the edge.

People will always demand high standards in what they watch. If anything, consumers are more discerning and sophisticated than ever. Television's ultimate strength is that it understands how to produce great content that touches people, and wherever there is great content, it will always find a market. That is our future. 🇬🇧



In his role as Chief Futurist for Cisco Systems, Dave Evans is equal parts blue-sky prognosticator and hands-on builder and tester. On any given day, he might be pondering the social implications of people living to be 200 (“Your 401k would surely run out,” he muses) or demonstrating a drag-and-drop car dashboard that could be in dealer showrooms in just a few years. His predictions include how the TV of the future will be a portal on your walls or on your mobile from the cloud, or even in your head; actors will be avatars and all programmes will be interactive.

Let me start with a few tantalising speculations about exactly where television might be in ten years time...

On your wall – and I don’t mean the 40 or 50 inch screen that you may already have, hung on brackets. No, I mean that your whole wall could literally be a television screen, giving you a window on the world in any way you want it to. In a decade from now, bandwidth to the home will be sufficient to display streamed video on every square inch of wall in a mid-size home. There are people right now experimenting with ultra thin flexible displays and smart coatings spread on the wall like cream cheese that will enable you to turn any room of your house into a communications and entertainment portal.

In your pocket or handbag, even on your wrist, as a more portable medium than ever. In the past, you were a slave to a box in the living room, watching what the box offered you according to its schedule. Now we have iPads, smartphones, and (imminently) smartwatches. Already we’re used to television on demand, but that will evolve to the point where you’ll create your own customised dynamic TV guide that you carry with you, an aggregate of multiple inputs: traditional broadcasters like the BBC, but also new online sources, such as BT TV, HBO, Netflix, YouTube, where some of the content coming out today is so good it starts to rival high-end production studio work from major broadcasters. The cloud will also play an important role here, replacing your traditional static DVR or cable box and making it entirely virtual, so you will be able to pause the show you’ve been watching at home, go to a hotel or a friend’s house, and resume watching right where you left off.

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In your head – or so it will seem. There's a wonderful device being developed called Oculus Rift, a kind of virtual reality headset that will revolutionise people's gaming experience, and could also, I believe, make television a more immersive experience for viewers. The latest version has a high resolution 1080p display, with accelerometers and gyros in the headset so as you move your head to look up or look down, the display changes to match what you're looking towards. After a few seconds, you forget that you're wearing it. I watched a sample demo of a rollercoaster ride, and my body was almost instantly reacting just as if I was on the real thing, switch-backing at high speed.

I'm a futurist, which means I make my living out of guessing what will happen five or ten years hence. Two considerations are at the forefront of my mind when predicting the future. The first is where the technology appears to be heading: for that I sometimes need also to look at the past, to assess the pace of change by extrapolating from how quickly things have moved before. And the second is the human element: how will people respond to these technological advances? What new ways might consumers find that we haven't yet imagined to use the technology? Ultimately technology exists for one purpose only, which is to enhance our lives, and people are amazingly inventive in the varied uses they put it to.

One thing emerging clearly right now is that video is no longer just for passive consumption; it has become an interactive experience. It is also changing in terms of who is the producer; it's not anymore just about the big studios or networks. The type of technology that an individual consumer possesses now would rival what a studio had a decade or two ago. Just look at the power in your smartphone, and its capability to create and broadcast video that can be consumed by millions or even billions of people, via YouTube. The balance of power is starting to shift.

Consumers are being bombarded by so many sources of video and content. Single channel is becoming multi-consumption, multi-input. When you watch television, you often see Twitter posts scrolling across the screen. You may have your iPod or tablet on your lap, to watch something else on a secondary screen. With wearable technology like smartwatches, there could even be a tertiary stream feeding into your entertainment experience.

To cut through all that noise, TV networks are going to have to adapt or die, spending significantly more to make their product stand out. Not only in terms of production values: broadcasters and publishers will have to try harder to create content that is more customised, targeted according to a consumer's individual preferences, their previous viewing history and where they are at the point of consumption, so that it doesn't get lost in the competing chatter. Viewer demography and history become ever more important to capture, and well worth the expense.

As television becomes more interactive, it will also offer greater opportunities for advertisers. They will devise clever and entertaining ads done so well they seem to be part of the show, blending seamlessly into content, so that if you spot an actor wearing a leather jacket you particularly like, or using a new gadget you covet, you will be able to buy it and have it shipped to your home within hours.

In the attempt to attract audiences, we will probably see a lot more 'extremes' on our screens, pushing the boundaries of what can be shown. Compared to what was acceptable on television a decade ago, audiences have already become blasé about depictions of sex

On channels like YouTube, individual producers may compete with ever more sensational content. Though mainstream broadcasters will be more constrained, the limits of permissibility may gradually shift for them too.

and death. On channels like YouTube, individual producers may compete with ever more sensational content. Though mainstream broadcasters will be more constrained, the limits of permissibility may gradually shift for them too.

How exactly will we use that extra bandwidth to the home, enabling you to have displays on every wall and in effect live inside a giant television set? You could be cooking to follow the recipe showing on *Masterchef* which is being streamed to the tiles above your hob. Or you could use your walls as a portal to anywhere else in the world. You could be working with one eye on your elderly parents, through a video link to their home. Family viewing will take on a whole new meaning. On a Saturday evening you could be sitting down virtually with your whole family to watch *Strictly* together – with the programme appearing on one wall, your daughter in Australia on the other, your grandchildren in America on another. Today we tend to think of video as something that is on or off, but once you can create a display on any surface, that will change – just as a few years back, we used to think of the internet as on or off via dial-up, but now with broadband we are connected all the time. Your parents or your children, wherever they are, can be with you all the time, and you will only have to walk past the particular wall that acts as your portal to them to stop and say hi.

And as screen and camera technology improves, all of this will be shown in ever higher fidelity, until we reach the point where the human eye will not even be capable of discerning the available detail.

Let's finish with a real stunner: virtual actors. We've already seen amazing virtual environments and virtual characters in films like *Avatar* and *Lord of The Rings*, but that's only the beginning. Soon we will be able routinely to augment casts with virtual actors so lifelike they will be indistinguishable from a living breathing human. Take a look at the Digital Emily project, the work of a company called Image Metrics, who have posted examples of their

progress so far on YouTube – the results are breathtaking. A virtual actor can do stunts a real actor can't; they can be killed or dismembered and come back to life. My bet is that within two decades, a virtual actor will win an Oscar.

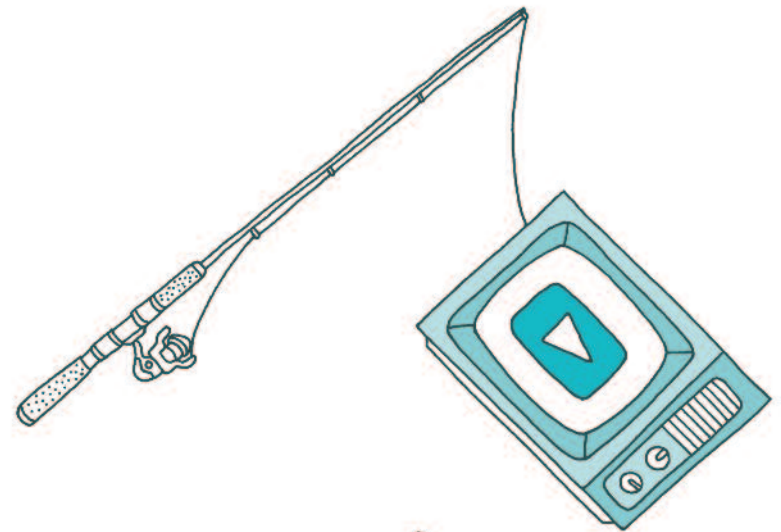
Why stop there? Virtual actors may even be subtly morphed into a unique cast member designed to appeal specifically to you, based on personal preferences extracted from the available data on you as a viewer, pulling information from your social network, and feeding that into the programming to change dynamically what you are watching. Your leading lady could have bigger breasts, longer legs, your preferred hair colour. The murder victim could magically resemble your boss. The main protagonist could look like you.

As they say, you ain't seen *nothing* yet. 🤖

Soon we will be able routinely to augment casts with virtual actors so lifelike they will be indistinguishable from a living breathing human.

Start your own television channel

Justin Gayner



Justin Gayner is the former creative director and co-founder of entertainment website ChannelFlip. He has a background in traditional media and television, writing for the Daily Telegraph, taking on the role of commercial director of QI Ltd., and producing a number of comedy series for Warner Music Group. He argues that future TV will disappoint vast swathes of the population who crave something more specialised, while traditional TV production is becoming one of the least certain and least satisfying ways of earning a living.

What is the future of television? This has to be the single unanswerably big question affecting all of us in the industry. For a start, what do we mean by television? Is it the box in the corner of the living room? Is it our phone or tablet device? Is it a glass building in a fashionable part of London full of commissioners and network executives? Is it a schedule packed with mega-productions featuring the nation's favourite and most talked-about presenters? Or is it a 65 year old from Leeds who happens to be passionate about carp fishing, filming himself chatting about his rod?

There is a section of today's audience – the section, as it happens, that ChannelFlip most appeals to, 13 to 25-year olds – who want something rather different from what satisfied their parents and grandparents a decade ago. In ten years' time, they will be calling the shots. They are the future of television. They want to be able to watch whatever content they want, whenever they want to watch it, on any device, and they want a voice, so they can interact with the content. While they enjoy and embrace traditional storytelling, they also want a different kind of experience – faces and voices they don't necessarily see and hear on traditional television. Why not? Because it doesn't have the capacity to deliver to all the different species of audience there are.

By its nature, traditional TV – BBC, ITV, Channel 4 and so on – has to aim to be all things to all people and serve up content that that appeals to the largest number of the population at any given time. Even the channels that attempt a different focus are becoming more samey in what they are producing. Should we blame the commissioners or channel heads for this? No, they have a job to do,

You could also be creating a straitjacket in which eventually no one creative will want to work, because traditional TV production is becoming one of the least certain, and least satisfying ways of earning a living.

to increase the ratings and bring advertisers to the channel. The problem is that leads you inevitably to disappoint vast swathes of the population who crave something more specialised. You could also be creating a straitjacket in which eventually no one creative will want to work, because traditional TV production is becoming one of the least certain, and least satisfying ways of earning a living. I know this because I used to be passionate about traditional television. I landed my dream job through one of the biggest slices of luck you can imagine: I was a journalist working on *The Daily Mail* when I interviewed the legendary John Lloyd, producer of *Blackadder* and *Spitting Image* among other hugely successful comedy shows. John was launching a new show called *QI*, and somehow I managed to impress him with the piece I wrote (a badger's penis came into it somewhere, but you don't need to know about that), and he rang me up afterwards and offered me a job. It may also have had something to do with the fact I told him he was my absolute hero and shamelessly begged him to free me from the shackles of print journalism.

The job was Commercial Director for his production company – a job I could hardly have been less qualified for, knowing nothing at the time about either television or running companies. But working with John was like a media MBA. We launched not only the book of the series, *The Book of General Ignorance*, but also a comedy website channel, a radio show, and even a private members club in Oxford called The *QI* Club. Along the way I picked up an understanding of the value of brands, and that stood me in good stead when I went on to launch my own business later.

John is not only one of the nicest guys in the business; he's also one of the greatest comedy producers of all time. As we went cap in hand with new ideas to see TV commissioners, I naively thought that if you are the best at what you do, and the idea is good, surely it's a given that you'll get the gig. But as we know, that's not the way the television industry works. It works on who's hot at that moment, on

personal relationships between commissioners and producers, on complex political relationships between production companies and talent. The moment when the scales fell from my eyes came when John pitched a brilliant concept called *Class War*, a TV panel game where a group of privately educated Oxbridge graduates would be pitted against people from a working class background, the intention being to show that an expensive education did not necessarily make you brighter or better. We had the backing of Peter Fincham, then the CEO at Talkback TV, and he came with us to pitch the idea to the Controller of BBC One, Lorraine Heggessey. Lorraine was interested, but not enough to commission it on the spot, and before we could tweak it enough to satisfy her she had left the channel. By an extraordinary twist, she took on Peter Fincham's job at Talkback, and Peter took her old job at BBC One, so John and I went back to pitch to him, confident that since he'd been involved in the original pitch, he was sure to commission it.

He turned it down.

It was at that point I realised I no longer wanted to work in an industry where great ideas can fall down a crack and never get made; where producers of content can't have direct relationships with viewers or develop their products further because the broadcaster takes the digital rights and stands between them and the audience; where the underlying principle of markets, that the best product should succeed, were being subverted. Why would a young man or woman think of investing their future in such a precarious business?

But the beauty of today's technology is that anyone can start a television channel. YouTube is an open platform. Putting your

John Lloyd was launching a new show called QI, and somehow I managed to impress him with the piece I wrote (a badger's penis came into it somewhere, but you don't need to know about that), and he rang me up afterwards and offered me a job.

video there is considerably cheaper than starting a TV channel through buying an EPG space on Sky. As I pondered my future, friends were emailing me five or ten funny videos a day to share, and it occurred to me that the phenomenon was only going to get bigger. If you could create some inventory space around the content, there was an opportunity for commercialisation, and brands would ultimately want to connect to audiences via YouTube. With John's blessing, I left to make online video shows and set up with Wil Harris, whom I'd met in the QI Club, what eventually became Channel Flip.

It was tough going at the start. We hired a little room in Oxford and with a small team began making online video shows, two episodes a week, written and performed by ourselves, to see if anyone would watch them. I presented a film review programme, Wil made a technology and gadget show, and Katherine Fletcher reviewed computer games. After a few months we were getting ten or twenty thousand viewers per episode – not enormous but enough to prove the concept was viable. We sold a bit of advertising, and because we were inexperienced and didn't know the right people we spent an inordinate amount of time raising modest amounts of money – about £150,000. Then we splurged the lot on a website. That was a big mistake – we were still obsessed with the old broadcasting model, and our wrong-headed vision was that we needed to create the destination for people to come to us. But the maths didn't work: it cost us more to acquire customers to visit our website than we were making from advertising yields. Eventually we realised that the easiest way to get people to watch is to put them where the audiences actually are, instead of making them come to us: on newspapers' web pages like *The Guardian*, on iTunes and YouTube, and as an app on phones.

For the first couple of years, Wil and I went unpaid, and I survived on my cut from the sales of *QI's The Book of General Ignorance*, thanks to John's generosity. By now we'd settled on comedy as the

mainstay of our output, and moved to London. The real breakthrough came when Ian Christie, a former CEO of Saatchi in New Zealand, joined us. He persuaded us that branded content was going to be the future of advertising, and so our business model should be to get our content funded upfront by brands, then use our expertise to make and distribute it.

Our first branded content deal was with a small start-up called Bulldog, which made organic skin cream for men. The comedian David Mitchell was at that time interested in the possibilities of doing a solo piece, separate from the partnership of Mitchell and Webb. We persuaded him to write and perform *David Mitchell's SoapBox*, a three or four minute weekly rant which became a huge hit, showing our backers that we could secure A-list talent, and setting the tone for ChannelFlip. The biggest boost came when YouTube agreed to share the money with us, and made us a multi-channel network – rather like UKTV is within more traditional TV. We now run 250 channels on YouTube, and work with talent to create low-cost but high-impact video, around which we sell advertising. We have 100 million video views a month, and around 24 million subscribers to our various channels, and it goes on growing all the time. As a multi-channel network, we have a bigger audience than ITV in terms of hours watched, and our ambition is to become the biggest commercial broadcaster in the UK. The audiences are by no means just UK-based either – soon ChannelFlip's biggest audience will be Americans.

So what kind of a future does that leave over the next decade for traditional broadcasters? Actually, I don't think they're doing too badly, given their remit. Peter Fincham, responsible for my road-to-

Then we splurged £150,000 on a website. That was a big mistake – we were still obsessed with the old broadcasting model, and our wrong-headed vision was that we needed to create the destination for people to come to us.

Damascus moment, has done great things for ITV, and there are still big water-cooler moments that are immensely valuable to advertisers. But if I were running a terrestrial channel, I'd be on the hunt for ways to service different audiences through digital. We have hardly scratched the surface of niche audiences. Do I think there is a great little business delivering premium content to carp fisherman? Yes: consider the money anglers spend on tackle and rods and access to the right place to fish, and their thirst to know what is happening next season. For carp fishermen read also skateboarders, ramblers, knitters, pigeon fanciers, vegetable growers, chocolate lovers, etcetera...

But TV needs to focus on both the micro and macro - how to service the niche world, and how to capture global audiences as well. Traditional broadcasters should stop thinking of themselves as UK players. What Netflix, and to a certain degree Sky too, have shown us is that we now live in a connected global economy hungry for a high-quality slate of programming. The opportunities are certainly there for anyone bold enough to take them.

TV producers, print journalists, even novelists are all complaining about how difficult it has become to make a living, but in fact these are exciting times. There has never been a greater opportunity for people working in the creative arts. When an unknown writer can put her book on the internet, break all the rules and sweep everything away before her to become the first great publishing sensation of the twenty-first century, there's surely an opening for anyone with a story to tell, or an idea to turn into a show.

But the most important shift for the future, indeed the biggest problem to crack, is a new way to get people to pay for content. Advertiser-funded, programming will no longer be a viable model for traditional TV. Both terrestrial broadcasters and commercial content producers like ChannelFlip are already exploring how we can fund tomorrow's television. We have to come up with clear

revenue streams around what is being made. That - as well as understanding our audience - will determine the future of television in ten year's time. 🗣️

Let me tell you a story
Tony Jordan



Tony Jordan, formerly an East End market trader, was for many years the lead writer and series consultant for *EastEnders*. His production company, Red Planet Pictures, is backed by leading indie Kudos Film & Television. He reveals that his continuing success in drama productions is not based on metrics or big data, which doesn't help us understand the audience. He is adamant that once the commercial side of TV starts to dictate to the creative side, it's a sure route to disaster.

Storytelling began thousands of years ago around campfires in the desert: lonely travellers listening to the spinners of tales. Audiences have become massively bigger over the generations, but the speed of technological change suggests that ironically, drama and storytelling are heading back to where they began. Ten or twenty years from now, you could be sitting at a campfire in the middle of nowhere, hundreds of miles from the nearest television set or mast, and catch up with your favourite TV drama – and it's not too great a stretch to suggest that instead of watching on a conventional screen or even an iPod, you'll be picking up *Casualty* on your wristwatch, or tuning into *EastEnders* via your glasses.

The interesting question for me, as a writer, is how those stories will be told. Will the fact that delivery will be so personal, an individual rather than communal experience in front of the family's living room television set, fundamentally alter the way drama is constructed?

But if television is to have any future ten or twenty years down the line, the people who commission TV drama need to keep one thing firmly in mind – it's all about the audience. By that, I don't mean burying your nose in data and research and focus groups. I write for people that watch telly, and to be successful at that, you need to understand people and the things that unite them, to watch television as they do. Perhaps it's a working class thing, but I love grabbing a cup of tea at the end of a long day, putting my feet up, and watching something on the box that helps me lose myself in a good storyline. It's about watching television as a viewer does, so you understand who your core audience is and what they want, honing your instincts for what will grab them.

Perhaps it's a working class thing, but I love grabbing a cup of tea at the end of a long day, putting my feet up, and watching something on the box that helps me lose myself in a good storyline.

Before I came into this business, I worked on a market stall, day after day with ordinary people, listening to them talking about their life experience, what they watched on the telly last night and why. That gives you a great instinct for how to play an audience – a skill that seems to be conspicuously lacking in some of the TV executives I’ve met, especially those obsessed by the metrics. Take soaps. I learned my trade writing for a soap, and that’s made me a bit of a purist about the genre. It’s common knowledge that I won my first break as a writer by sending an unsolicited script about market traders to the BBC, fortuitously at the point they were looking for new writers for *EastEnders*. (I didn’t dare correct their misapprehension and tell them I was actually born in Southport, Merseyside, so I spent the next five years pretending to be a Londoner.) Twenty years of market trading teaches you a lot about people, and writing in my shed at the bottom of the garden, I feel the audience behind me looking over my shoulder at every word I put down, and I can hear them talking about it the next morning. It helped me through those years of crafting plotlines for Albert Square.

But looking at what’s on the screen today, my belief is that the bubble bursts for soaps (and television in general) the minute those in charge become cynical and lose regard for the audience’s intelligence. There are far too many meeting rooms – not just in the UK, but throughout the global television industry – where the people deciding on storylines have no real sense of who watches, and no respect for what they might want.

You can imagine the conversation in the production office. “Oh, nothing much is happening at Christmas, so let’s kill him and make her a murderer, or let’s steal a baby.” Never mind how these particular characters have behaved previously; it’s all about the shock value.

These people don’t understand what the audience really loves about a series like *EastEnders*: the indomitable spirit of the characters. Yes, the world may be shit, yes, I may not have any money, and yes, my husband may have just left me, but do you know what? I’m going to roll up my sleeves, take care of my children and get on with living, doing the best I can because I don’t know what else to do. Audiences are inspired and moved by that, because it reflects real people coping with real life. It’s why people watch that kind of drama, it makes them feel part of something. And that, frankly, is a million miles away from a group of affluent TV types sitting around in a television meeting room musing: “What can we do to pull in a big seasonal ratings boost? What if he shags her? What will get us the most headlines?”

I’m by no means a data snob: every show Red Planet does, I get a report stuffed with graphs and pie charts which I read, and find rather interesting. But those numbers don’t necessarily affect what I choose to do next. I plan my projects using my own instinct for an audience, instead of what someone tells me my audience is thinking, extrapolated from a mass of figures. If you believe that data is king, and consequently plan with the intention of making those pie charts look right, you are doomed to fail.

Number crunchers easily fall into the trap of placing too much reliance on knee-jerk reactions. Researchers sometimes give an audience a dial on the arm of their chairs as they watch a new show: turn it to the left if they are happy, turn it to the right if they don’t like what’s on screen. I’ve had conversations with executives who’ve told me: “See where the chart dips? They weren’t happy with that line, they didn’t like that kiss.” But instant recoil should not be used to inform decisions about what works in a drama; that kiss may be

You may get a temporary spike in audience figures when your soap character goes berserk and murders his mother, but six months down the line, has your core audience begun to trickle away?

setting up something that happens twenty minutes later, and without it the story doesn't hang together. It's like telling the kids to get in the car when it's cold and raining – they'd be turning their armchair dials to say they didn't want to, but once the car arrives at Thorpe Park, everything is different. What matters is how the viewers feel about the story at the end. Similarly, you may get a temporary spike in audience figures when your soap character goes berserk and murders his mother, but six months down the line, has your core audience begun to trickle away?

Of course headlines matter, and there has to be a commercial side to this industry as well as a creative side, or what would be the point of me sitting in my garden shed writing scripts all day without someone finding the money to get them made? Equally, there are two kinds of execs that I've come across in TV. The first type play it safe, and want the security of a writer they know, a bankable star, and a format that's been proven to work before. The others want to be innovative, be willing to take a risk and are in the business to set the world on fire, not maintain the status quo. For the moment, there is a pretty good balance of the two in television. But once the commercial side starts to rule the creative side, it's a sure route to disaster.

I'm not saying I always know how to get it right; sometimes I've been spectacularly wrong about what an audience wants. But as long as I feel proud of what's on the screen, that I've been true to myself and to my characters, failure doesn't sting so much. I just learn from it, try and understand why I was so out of tune with the audience and move on to the next project. We shouldn't be afraid to fail sometimes.

Incidentally, I don't buy the line that we aren't spending enough on drama; it's rather more nuanced than that. I'd say investment in drama is, if anything, even greater than before. But a lot of the money is not coming from the UK. Today, many shows are funded

using co-production money from abroad, and realistically there will be a quid pro quo. *The Nativity*, which I wrote for the BBC a few years ago, was part-funded by Canada, and in return some Canadian actors were cast, and money was spent over there on post-production. Again, *Death In Paradise* is a joint UK and French production, so we have a French lead in Sara Martins and it is shot in Guadeloupe, a French territory in the Caribbean.

This is the way of the world today, and I wouldn't necessarily want to change it: both productions benefited immeasurably from co-funding. But my main concern looking ahead is how easy it is for a show to fall into the wrong hands and be watered down. There is a danger that with the wrong kind of producer, you will be making decisions based solely on raising the necessary money to get the show made. That has already begun to happen in the film industry, which has been hijacked by the kind of executives who like to play it safe. It may even be why we are seeing such an outpouring of creativity from screenwriters who are choosing TV to tell their stories, because for now they have more freedom in television. When television too becomes about putting the deal together, rather than the creative integrity of the product, we will be in big trouble. I am hoping that there are enough of us in the business who care enough not to allow that to happen, but it is my biggest fear for the future of television drama. As television companies become financially more ambitious, and TV drama more and more expensive to produce, could it too go the way of Hollywood?

But let's put aside these gloomy thoughts and look ahead instead to the question I raised at the start: what sort of stories might we be telling ten years from now to those lonely viewers watching under

Don't rely so much on the numbers, let the technology go where it will, stop panicking about a funding crisis: what matters, after all, is to know and understand the people to whom we are spinning tales.

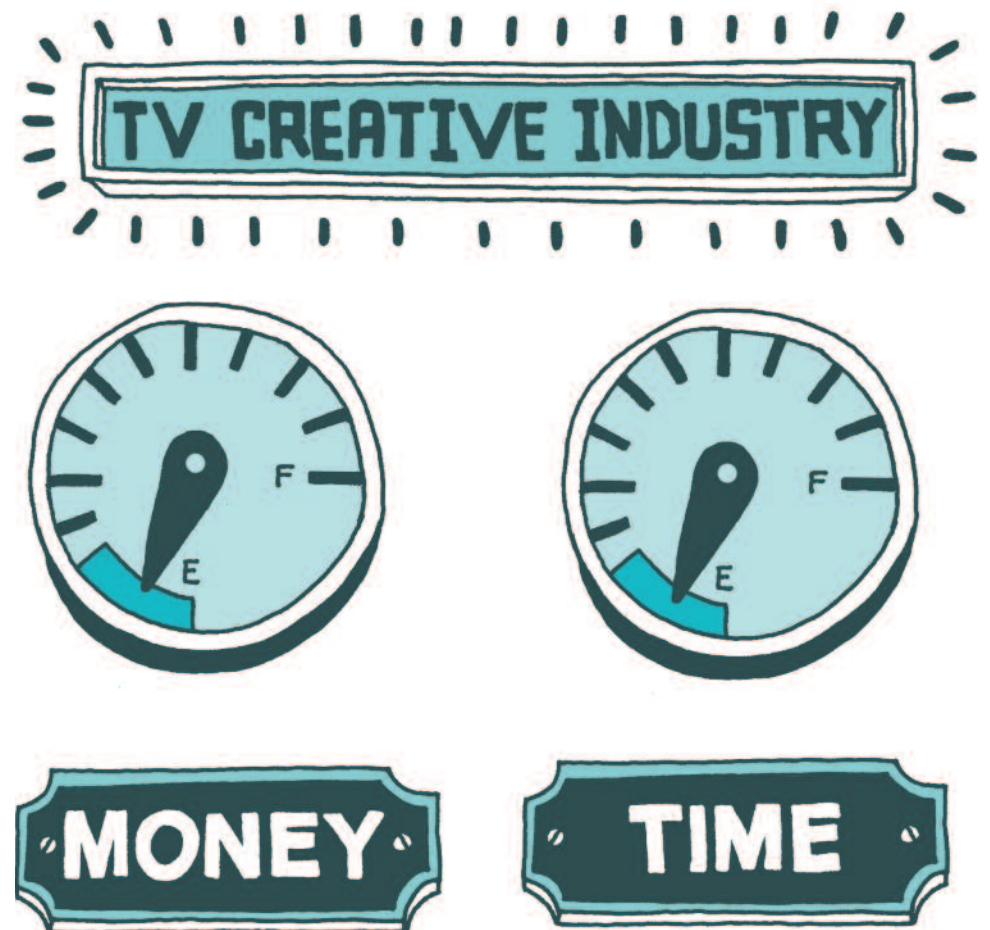
Rolling the dice on talent

Jon Thoday

the desert stars on their video-glasses? Will individual viewing change the narrative shape of television drama?

The more I think about it, the more convinced I am that it could all be quite simple – and not so different from what we should do today. When I used to spiel on the markets to fifty or a hundred people, all standing in front of me waiting to be convinced to buy, I used to find that something rather weird happened when it was going well. Those hundred people became a single unit, reacting as one, all doing exactly the same things at the same time. I've heard actors and comedians talk about the same phenomenon, in which an audience composed of many becomes just a single person when you get your performance right. So my guess is that whether it's one individual alone under the desert stars or twenty million, you're always talking to just one person.

Don't rely so much on the numbers, let the technology go where it will, stop panicking about a funding crisis: what matters, after all, is to know and understand the people to whom we are spinning tales. That doesn't come from a dial on the side of an armchair; it comes from living in the real world alongside them. 🗣️



Jon Thoday is the joint founder and Managing Director of Avalon Entertainment Ltd. As a producer he has been responsible for many successful shows including the multi-BAFTA winning *Harry Hill's TV Burp* and the RTS and Rose d'Or winning *Not Going Out*. He is no stranger to negotiations, having sorted out Frank Skinner's £20 million move from the BBC to ITV. He controversially argues that the creative future of the UK is in jeopardy, because the mainstream TV channels are not allowing enough money and time for development.

Rights and talent are the two most important commodities in broadcasting. Forget everything else: the future of television is wherever those two essentials can be optimised, and channels ignore that at their peril. I fear that British broadcasting is shooting itself in the foot at the moment. The creative future of the UK is in jeopardy because the mainstream channels are not allowing enough money and time for development. They would rather license a foreign format than develop their own shows with UK producing talent.

When I started out as a manager, twenty years ago, television was largely run by showmen – commissioners and controllers who thrived on discovering and developing new talent. People like David Liddiment, Alan Yentob, or Michael Grade were prepared to give new names and new shows a chance, and their legacy is content and talent that still makes waves today. They and their predecessors were people with a good eye, a pot of money, and patience – the sort of commissioners who could spot a star in the making, who persisted with Morecambe and Wise, or David Jason, talented performers whose early shows flopped. In the 1990s, David Liddiment was prepared to give a young, relatively unknown comedian like Frank Skinner a three-year deal, giving him exposure on three different shows – it was only in the third year, with the third show generating 11 million viewers, that Frank really took off as a major star on a mainstream channel.

Today such people are few and far between. Perhaps Danny Cohen has a similar track record – the man responsible for *Skins*, *Fonejacker*, and *The Inbetweeners* at Channel 4, for bringing *Russell Howard's Good News* to BBC Three, and for *Call The Midwife* on BBC One. My fear for the future is that we don't have enough

My fear for the future is that we don't have enough showmen at the major channels in the UK, and consequently not enough money going into programmes to support the kind of creativity the UK is known for.

showmen at the major channels in the UK, and consequently not enough money going into programmes to support the kind of creativity the UK is known for. Shows that took over America, from *Who Wants To Be a Millionaire?* to *Pop Idol*, were born in the amazing creative cluster that is the UK, part of an effervescent outpouring of ideas in which both channels and independent producers benefitted from selling the rights around the world. Now the marketplace is even more global, but we seem less well-placed to take advantage of it. The pressure to cut programme costs has dangerously weakened all our major channels, making investment in development too low, and expectations for new shows too high. When a brand new show is a success, it's largely an accident – but statistically you need a lot of new shows to guarantee that you will have enough accidents. ITV for example seems more interested in investing in foreign production companies than home-grown talent and new TV shows. Broadcasters too often pursue short-term gain with licensing of a foreign format, rather than long-term gain with what the British industry has done best in the last 20 years: origination of new shows.

Certainly the rise of the internet has brought about an explosion of creativity through people producing their own content online. But the point about a big mainstream channel is that it is supposed to have enough money to make the kind of shows an individual can't put together by him or herself. Unless new talent emerging online gets investment, it won't grow and generate more money for reinvestment in the creative industries.

As I write, I'm in Los Angeles, seeing a British comic called John Oliver whom I represent. He was a member of the Cambridge Footlights at the same time as David Mitchell and Richard Ayoade. Some years ago I went to Channel 4 with the suggestion that he might host a topical show for them. I was hardly through the door before the commissioning editor said: "Whatever you do, don't try and pitch me John Oliver." She wasn't interested because he wasn't

well enough known. Not long after that, John landed a job on *The Daily Show* in the USA with Jon Stewart. He's been there ever since, and is about to leave to host his own show on HBO. That isn't just an opportunity missed, it's a prime example of how UK broadcasters are not prepared to risk their money on guaranteeing new talent a chance to develop and mature. HBO, incidentally, is a classic case of the right way to do it. They spend more money per hour on their shows than any other, they are generous to their talent and producers, and they are the most profitable channel in the world. In the States, it is the cable channels that thrive because they have realised that they are dependent entirely on their content – while UK broadcasters fiddle about launching new channels, thereby fragmenting instead of augmenting their spend.

We're also reaping the results of an imbalance in the career histories of those who get the top jobs in UK broadcasting – almost entirely recruited these days from the ranks of factual executives or ex-producers. Weirdly, unlike new drama or comedy, new factual shows tend to work pretty much overnight; entertainment TV usually takes a lot more time and tweaking before it builds an audience and becomes a success. There are almost no breeding grounds for new entertainment shows in the UK. BBC Two, where *Have I Got News For You* began has little entertainment money and is described by its controller as "a factual channel". So we have people with a limited kind of experience making the commissioning decisions, and not allocating enough resources to new 'tent-pole' shows. The cost per hour for mainstream entertainment and scripted TV is set too low, so the only way to fund a big new drama or comedy is to do a co-production. But co-productions by their very nature mean compromise, whereas originality tends to spring from the clarity of individual genesis and decision-making.

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Creativity has always occurred in clusters, places where talent naturally gravitates towards the hub. London is the greatest creative centre in the UK, revered throughout the world. The difficulty for the BBC is that the Director-General is a quasi-political figure, whose main task is seen as Charter renewal. So if the government of the day hints that license fee increases and Charter renewal on reasonable terms depend on the BBC's willingness to create more jobs outside London, then programme budgets have to go down as the new buildings go up. This has led to money spent on programmes and talent being reduced. Surely it is obvious that when money is tight it makes more sense to put your income into the main event – which, for a broadcaster, has to be programmes – rather than increasing your overhead. UK programming is amazing and has massive export value and should be protected.

The licensing of rights is another area of contention. When the BBC cuts back and reduces spend on programming, it has repercussions throughout the industry, allowing other channels an excuse to underpay. Where is the incentive for independents to develop new formats if they can't expect a decent return? They have no choice but to sell their business to a foreign buyer rather than build a creative production house. Most of the first generation independents have been sold to foreign owners, and the broadcasters seem to be trying to turn the clock back on the new and remaining companies by making the deals and money so tight that new companies are unable to grow into new powerhouses of innovation. Increasingly new UK independents sell out at the first opportunity rather than growing into new creative hubs.

Online has no gatekeeper; hence the reason so many talented people are bypassing the mainstream channels and putting their work on YouTube. Yet emergent talent can easily sink and disappear in the vast ocean that is the internet. Mainstream UK channels often fail to understand and capitalise on their great

advantage, their ability to market newcomers at virtually no cost by placing their shows next to an old favourite with a big audience.

For me, the real value of online outlets like YouTube, today and in the future, is not so much as a place to trawl for new talent, but as a way of making a local name global. YouTube has helped make Russell Howard a star in territories where he has hardly ever set foot. A US comic called Rob Delaney whom we manage had never been to the UK, but with one tweet, he sold three thousand tickets in the UK.

We need the mainstream broadcasters to be the biggest players in ten years' time so that new shows can be properly financed and launched. New kids on the block like Netflix may be successful but I have some doubts. Netflix's problem is that its buy-now-pay-later business model depends on it growing faster than its debt, which is mounting rapidly. It could be the victim of its own success. The studios are starting to wake up to the fact it could be a competitor, and unless Netflix manages to secure the majority of product it is hard to see how it can continue to grow.

If the day of the mainstream channels is over, then is the future artists taking control of their work, becoming more powerful by running their own production companies or their own channels? Not really. What makes talent powerful is being hot and in demand; running your own production company or YouTube channel, as Jamie Oliver does, can be a distraction. If you have your own channel, you have to worry about supplying the channel with enough content. If you have a production company, you will be carrying an overhead that may constrain your decision-making, and could force you to do a show for all the wrong reasons: not because

New kids on the block like Netflix will either be very successful or will go bust. Netflix's problem is that its buy-now-pay-later business model depends on it growing faster than its debt, which is mounting rapidly.

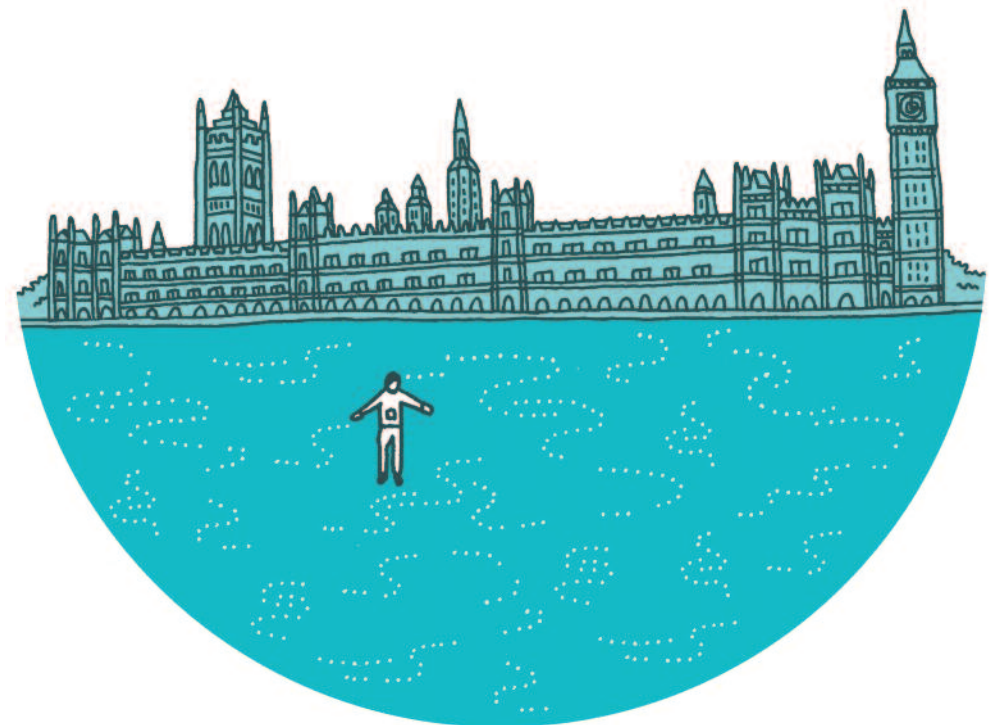
Sitting on the future's edge

Dynamo

it's the right vehicle, but because you have to keep earning to feed the overhead. And if it's for your own channel, how can you maximise the deal? An equivalent in live events is where a stand-up star decides to own a theatre; the trouble with running a theatre is that you have to fill it 365 days a year and clean the toilets, when you could have made more money negotiating a large slice of the box office and appearing in an arena like the O2 for ten nights and spent the rest of the year doing something else.

I have always believed that in the entertainment business it's vital to separate business from creativity. Whenever I've failed to follow that principle, I've regretted it. Early in my career I had two big flops that taught me you should never let yourself get into the situation where you have to produce something simply to pay the bills. Once you've made a bad decision and allowed your standards to slip, like junk food it can lead to a general deterioration in your taste. That's how so many talented people wind up in a purple streak. Instead, look for the good idea and then see if you can make it work in creative terms, and let the business follow, rather than vice versa.

The way to succeed is to think creatively; that's what will secure the future not only for talent, but for television itself. 📺



Dynamo – is a magician celebrated for his series on *Watch*, *Magician Impossible*. Some of his tricks are subtle tweaks on nature and reality, such as growing an orange from the tiny bud to a fruit on a citrus tree. Sometimes he uses extraordinary forces to walk on water. He suggests that what's happening to magic on television could be seen as a predictor for the industry as a whole: in his own career, being forced to take the outside curve turned out to be the best route to success, using social media as a marketing tool.

Magic's an art form. People laugh at Paul Daniels now, and think of him as the antithesis of cool, but in his day he was a legend and an artistic genius. Ever since he left our screens, people have been trying to reinvent magic on television for a new generation, but in the process they made the mistake of trying to be too clever and change it too much, and that's made the audience cynical, looking for trickery and deceit. People may say I've reinvented magic for a new generation, but actually all I've done is strip magic back to its raw essentials – no smoke, no mirrors, no fancy stages, just me and the people, and as much as possible filmed in one shot. Forget glamour and illusion – I want to promote a more authentic kind of magic, putting the simple wonder back into magic on television with shows like *Magician Impossible* on *Watch*.

In some ways what's happening to magic on television could be seen as a predictor for the industry as a whole. For too long the industry's been in the hands of a small group of professional people who think they should have the last word on what works on TV and what doesn't. When I started out trying to get my magic on television, I was always being told the ideas I had wouldn't work, that I needed to think of a different format, and get a more professional team behind me. Walk on water across the River Thames? Don't be ridiculous, they said, it's never going to happen. Well, I've wanted to walk on water since I was eleven years old, and I wasn't going to let myself be deterred by a bunch of high-powered suits.

Right from the start, I've had a vision in my mind of how I want my magic to be perceived. Because I couldn't get anyone at the TV companies to listen to me, I had to do it my own way, getting my friends to film me, learning as we went along how to get the effects

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we wanted. Being forced to take the outside curve turned out in the end to be the best route to success, so that the TV companies ended up coming to me.

Social media was my only outlet in the early days. I got a start-up loan from Prince Charles' Prince's Trust, and used the money to buy a camcorder and a laptop. Having watched a lot of videos on YouTube, I'd noticed that the most popular at the time were the ones where people interviewed celebrities. So I thought if I could get to meet celebrities on one of their press junket days, and then instead of interviewing them, surprise them by doing magic tricks, I'd have some great footage to post on YouTube myself.

As Steven, I'm quite a shy person, so you might think being pushy enough to blag my way backstage and hang out with famous people would be difficult - but I've always been good at using my magic to do the talking for me. Being Dynamo gives me the balls to try anything. It turned out to be a real winner. The celebs loved it because it was different from people asking all the same old boring questions, and I managed to build up relationships with people like Matt Lucas, Snoop Dogg, Lindsay Lohan and Pharrell Williams that are useful to this day, so I can ring any of them up and ask them to appear on my show.

When we posted the celebrity videos on YouTube they got millions of hits. That at last got me noticed by TV people, but they still wanted me to do things their way, with their ideas and their crews. It would have been easy to sell out and take the money, but that wouldn't have been the show I wanted to make, so I stuck to my vision. At one point, thinking it was time I graduated to doing things more professionally, I did try hiring a proper cameraman, but actually found the magic came across better if I worked with a friend who knew my style and how I like to do things.

It took a good six or seven years of hard graft before perseverance

paid off and the right sort of deals started to come through. By that time I had a great team of creative people behind me, and I thought now I've come this far, what's the point of paying a production company to make the shows? So I set up my own, Inner Circle Films.

The possibilities for television magic in the future are very exciting. I've tried filming using 3D, and it's really cool to have the object I'm levitating seem to float right out of the TV screen for the viewer. I think 3D still has to develop further before viewers will be comfortable with it - it's a pain having to put on a pair of glasses, and once we get rid of having to wear them, that will be when the real magic of 3D starts. But my feeling is that if TV technology gets too advanced, it could water down the magic. The real joy in magic is the sense of being there, feeling you are witnessing it in real life, not through showy technology that casts doubt on its authenticity. I like to keep magic clean and simple, doing as much as possible in one shot so no-one can say, "Ah, it's all done by camera angles and editing."

I love the feeling I'm sitting right on the edge of the future, helping to develop magic for a new generation of viewers. There's a lot of pressure to do stunts that are bigger and more and more outrageous. As Houdini once said, the way to generate a crowd is to put your life on the line, and as anyone who's ever watched Channel 4's *Rude Tube* knows, the most-viewed clips are ones where people are doing something dangerous or extreme. But although TV channels tend to push for more death-defying stunts, my passion is more for the simple beauty of a piece of magic, and it doesn't matter if it's small-scale so long as it's amazing. The most dangerous illusion is not necessarily the best illusion. I don't

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Television and the 'tweet spot'

Bruce Daisley

mind pushing myself to the limit, but I don't think it's worth dying to get a bigger audience. Magic to me is about that intimate moment with a group of people who witness something they just can't explain. The look on their faces, the sharp intake of breath, realising they've just seen and felt something they will remember for the rest of their lives – that's what magic is. Making all the phones in Times Square ring at the same moment, or putting someone's mobile phone in a bottle, are as wonderful tricks to me as anything.

It takes a lot of courage and persistence to stick to what you think is right when everyone else is telling you that you know nothing, you should leave it to the professionals. But that's what creativity is all about: having the confidence to stick to your vision. A few years ago, none of that would have been possible. But the rise of social media has opened these closed worlds to outsiders. We're looking at a future where television will no longer be run by an inner circle – we can become the inner circle, we can keep artistic control, we can be the future. That's what will keep television fresh and powerful... and magical. 📱



Bruce Daisley is the UK Managing Director of Twitter which has more than 15 million active UK users. Previously with Google, he is building the sales support team so that brands can use Twitter's 'promoted products' to reach customers. He describes the symbiotic relationship between Twitter and TV in the simple phrase "more tweets equal more ratings".

"20 years ago making a TV programme... the night the programme was shown you'd be sitting on your own at home, hoping people would like it. But the only way you'd actually know what they made of it - reviews apart - was when a few phone calls came, or when days later the letters of praise or blame came through the letterbox." So said Mary Beard last year when she was asked to account for the changes she'd seen in her time making documentaries.

"Now you find out what people are thinking of it as the programme's still on, because they tweet instant reactions from their mobile phones. Which makes it all rather more of a shared experience."

The change in television consumption that social media has facilitated has only just started to be played out. We've always loved watching programmes together with others. As the wonderfully perceptive Tess Alps from Thinkbox has pointed out, the first social medium where TV was discussed was the sofa. We can all remember how sitcoms seemed a lot funnier in the common room at college, or in the lounge with our flatmates. A joke is funnier when two people are laughing. When there's a whole timeline of people laughing then that joke's better still.

It's probably the open, public, live nature of Twitter that makes it such a perfect complement to TV. Twitter allows us to easily see what our friends are saying in our timeline, but also with a single tap to see what others are discussing about a show. None of your friends are up at 3am to watch the Oscars? Well don't worry, there's thousands of like-minded strangers willing to agree with your take on the winners. Over 90% of this public conversation about television takes place on Twitter. Twitter has become the social soundtrack to TV viewing.

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What we're increasingly reminded is that while a lot of TV is a deliciously rewarding escape, there have always been those moments in every show when the viewer jolts forward, sitting up to take notice. Viewers engaging with the show increasingly now reach for their phone. "Did Gary Barlow really just say that someone had 'fag ash breath'?" or "Hold on! Did some girl just come on stage and throw eggs at Simon Cowell?" These shared moments are the 'Tweet Spot' of today's programmes. They've always been there. We've all turned to someone and discussed what we're watching or revelled in a dramatic climax of an involving drama while waiting for the kettle with colleagues the next day.

Social media like Twitter has just made those moments measurable – and help amplify their impact. Des Lynam was asked this year how he'd known that BBC Sports Personality of the Year had been a hit. "While travelling around in the weeks afterwards, you just got a sense it was a success," he said. Des could save himself the top-up on his Oyster Card costs these days – Twitter is now like having a free, live focus group to gauge reactions to a show.

Compare this to Richard Curtis talking about the early episodes of *Blackadder*. He told the Guardian: "I used to wander round Shepherd's Bush, looking in people's windows, particularly people in basement flats, to see whether or not anyone was watching." That process has been transformed over the last 30 years, giving programme makers faster insight into the audience's reaction to a TV broadcast with overnight viewing figures. It's easy to dismiss this feedback – as Ben Elton has attempted over the social media savaging that *The Wright Way* received. Sue Unerman – writer of successful book *The Truth* describes Twitter specifically as 'the medium of truth'. You can hold it up like a mirror to your work and it will reflect back what people really think.

We're at the start of understanding the possibilities offered by the symbiotic second screen experience of Twitter and TV, and how

that will help programme makers, commissioners, channels and advertisers better craft and monetise their programming.

In the US, the Nielsen Twitter TV rating has been established as the definitive source for understanding the social impact of a TV show. The company, best known for providing TV ratings similar to the UK's BARB scores, have conducted research that shows both a correlation between Twitter viewing and TV ratings, and a two-way causation between the pair. In 29% of cases, significant increases in the volume of Tweets about a show led to a measurable increase in viewing. More Tweets, more ratings.

Twitter is an authentic network. It rewards those who are good, rather than those who are loud. It forces individuals and brands to think cleverly about things that will genuinely engage and resonate with their audience.

To achieve this, we talk a lot to companies using the platform about 'planning for the moment'. We know that people are using their smartphones, laptops and tablet devices as a second screen when watching TV. This creates a new space for brands, giving broadcasters and advertisers the ability to put their messages directly into the palm of the audience's hands, at the right moment.

And because the majority of information on Twitter, such as who you follow and what you tweet about, is public, it is also easy to target these messages to the right people based on a user's interest profile, and other signals they send us (like what hashtags they've clicked on). This unique combination of the right message, in the right place, at the right time, and to the right people makes Twitter an extremely powerful complement to traditional TV advertising.

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Anecdotally, we are already hearing from TV advertisers that they want to be positioned in TV shows that are more 'social'. They see Twitter as complement to their TV advertising campaigns, somewhere that they can continue the conversation about their brand and engage audiences in that discussion.

For every TV advert we witness a spontaneous conversation on Twitter. Brands can assist this by using hashtags and creative calls to action on air.

Take, for example, Three Mobile's #DancePonyDance this year. In the first week there were 200,000 Tweets from users using the hashtag - reaching over 21 million individuals. A quarter of these Tweets included the YouTube clip of the ad. Effectively the TV campaign was being broadcast by amused viewers who were passing it on themselves.

One of the simplest things TV show makers can do to tap into the social audience around a TV show is to integrate hashtags into their broadcast. Hashtags join conversations together. The hashtag on Twitter is a campfire around which people gather to tell stories. In truth, I've never gathered round a fire to tell a story, but I've seen it on telly so I'm certain other people do. Smart TV shows are putting their shows' hashtags on screen to say, 'Here is our campfire; come join us and share stories, tell jokes, be more involved.' I think marshmallows are involved.

It's not just about being live. Shows like the BBC's *Question Time* (#BBCQT) have found a new lease of life by giving viewers a chance to debate the issues of the day with fellow viewers by signposting that on air, even though the show is pre-recorded. In fact, #BBCQT was one of the UK TV shows that trended the most on Twitter in 2013.

We also know that when big events happen, they happen on Twitter. So during big TV moments - things like the *EastEnders* Christmas

special or the finale of *Broadchurch*, Twitter allows viewers to share in the collective gasps in living rooms across the nation, and signposting these with the relevant hashtag can be an incredibly effective way of encouraging an audience to join the conversation. The same is true of live sporting events - you can share in the excitement of a live event with fellow fans from around the globe. We saw this to great effect in *London 2012*, and again in 2013 when Andy Murray became the UK's first male singles champion of Wimbledon for 77 years. When victory was clinched, a nation reached for their smartphones to add their voices to the roar of the crowd, via Twitter. In fact, eight of the UK's ten most Tweeted-about moments of 2013 were sport-related, and broadcasters are recognising the value of this content, bringing it into broadcasts and stimulating the on-Twitter conversations with their own accounts too.

But it's not just big sporting events or season finales that get viewers reaching for their phones. Every show has its own Twitter DNA. A UK company called SecondSync tracked the Twitter mentions of two separate broadcasts of the Liam Neeson film *Taken*, showing at different times on different channels. The resulting graphs were near identical, with Neeson's fateful line "But if you don't, I will look for you, I will find you, and I will kill you" creating a notable spike in conversation during both broadcasts.

We also see trends in factual programming with tweeting happening throughout the show, as opposed to in drama with most of the conversation on Twitter happening after the dramatic climax or during the closing credits.

Programme makers create this narrative as they edit a show - for many years, they have been crafting these amazing water cooler

The hashtag on Twitter is a campfire around which people gather to tell stories. In truth, I've never gathered round a fire to tell a story, but I've seen it on telly so I'm certain other people do.

moments for TV, and increasingly we are seeing them become skilled at identifying these not only as talking points in living rooms across the nation, but as the aforementioned Tweet spots. Smart productions are pre-empting their shows' best moments – the moments that everyone will tweet about – and creating the Tweet that everyone else wishes they'd tweeted.

Clipping out these 'Tweet spot' moments allows them to arm viewers with that perfect piece of content to share, providing them with a moment that they can retweet to their friends, spreading the message of the programme, the channel, or the brand in real time.

We're also seeing broadcasters bring live feedback into TV shows. Take *The Only Way Is Essex* (or #TOWIE, as Twitter users know it). The show is pre-recorded, but ITV2 use their continuity bumpers to pull in live Tweets from viewers. They've even experimented with asking questions at the start of an ad break, encouraging viewers to turn to Twitter to answer, with a chance of seeing their Tweet appear live on air moments later.

So what advice would we give? Twitter is the second screen to TV and presents programme makers with a powerful tool to communicate with audiences in the moment. The platform itself is relatively simple – live, 140 character updates in chronological order – but the applications of it are hugely diverse. We're already seeing TV executives experimenting with how they can use this to their advantage, and I think we'll see a huge amount of innovation in the future as programme makers see this as a way to differentiate their shows, generate buzz and conversation, and produce demonstrable business benefits.

One thing that TV makers are cognizant of is that more attention tends to be placed upon the active, tweeting audience compared to the unknowable mass of passive viewers.

How Twitter and our ecosystem partners can help TV makers better understand those passive viewers whose engagement comes from reading rather than tweeting, retweeting, replying or favouriting, is something we are thinking about a lot and will be an exciting area for innovation in coming years.

But what we're also seeing is that shows are doing more to engage that passive audience, signposting to them the moments when they can join the conversation, and creating great content for viewers to engage with. The audience share that is active and can be further activated by a show will not only be more measurable in terms of attention (and sentiment), but also appreciated by sponsors as an audience that can be engaged during ad breaks (or with product placement/sponsored activities in shows themselves).

One way of unlocking this potential is through the talent associated with a TV broadcast. If Twitter is the world's biggest living room, then TV shows are increasingly working to get the stars of the show on the sofa with their audience, in real time. When cast or presenters are watching with the audience they create an even greater drive to watching live; they add value to the live experience and share their stories with the fans. Shows that have their talent on Twitter tweeting during transmission see a major bump in Twitter activity around shows and, in cases such as *Scandal* in the US, see demonstrable increase in viewers of the live transmission.

For example in the US series *Breaking Bad* we saw star Aaron Paul live-tweeting along with the episode. CBS runs Tweet Week events, Fox had the entire cast of *Modern Family* tweeting live shows.

I think we'll see a huge amount of innovation in the future as programme makers see this as a way to differentiate their shows, generate buzz and conversation, and produce demonstrable business benefits.

ITV Sport recently ran a groundbreaking initiative with the repeated highlights of the 2003 Rugby World Cup final. When Jonny Wilkinson kicked the drop goal which won England the 2003 Rugby World Cup title, Twitter didn't even exist. Ten years to the day since England's victory, ITV broadcast highlights from the match with a live Twitter commentary from former players including Matt Dawson, Lawrence Dallaglio, Will Greenwood and Phil Vickery.

The former players' Twitter commentary gave followers unique insights into their thoughts and emotions during the historic clash. Tweets were used on screen, and viewers could view more by following along on Twitter.

I think we'll see more innovation in this field in coming months and years as TV networks realise that they can use live Twitter content to add a new social layer to repeats, be that with expert opinions, or by giving the audience agency over what they see.

Finally, another thing we're excited about is how, rather than focusing entirely on activating an audience through dramatic moments and inviting an audience to simply join a conversation, TV companies are innovating in the world of utility, making talking about TV on Twitter a useful and functional act as well as an enjoyable one.

In Italy the introduction of #MySkyRec allows viewers to connect their Sky box to their Twitter account, and retweet a message about a TV they want to watch to record it. That functionality is extremely powerful for both the viewer, who can turn their social interaction into a meaningful action, but also to the TV channel, since that action is live and public. By sharing their TV viewing plans on Twitter, users are giving TV shows live, public feedback ahead of a broadcast - and also acting as marketing agents, spreading the word about a TV show via social media.

Watching TV is like eating a meal. You can do it alone, but it's all the more satisfactory when you are sitting with like-minded people.

We're fascinated to see UK companies innovating in the area of Twitter and TV, engaging with audiences in new and exciting ways. 🇬🇧

What television can learn from Yahoo

Dawn Airey



Dawn Airey is a consummate TV professional who started her career in ITV as a graduate trainee and eventually became Director of Programme Planning. The first Controller of Children's and Daytime Programmes at ITV, she went on to be Controller of Arts and Entertainment at Channel 4, the first Director of Programmes at Channel 5, and Managing Director of Channels and Services at BskyB, before moving back to Channel 5 as Chairman and Chief Executive and an executive with former owners RTL. Recently she moved to Yahoo as its chief in Europe, the Middle East and Africa. So why did she jump ship from television to go to online? Could it be the ship is sinking?

I love TV, always have, always will. It's been written off on many occasions, but has always proved itself an incredibly durable medium, much more versatile than its critics imagine.

So why did I jump ship to go to online? Could it be the ship is sinking?

I can promise you that nothing could be further from the truth. Television is still the ultimate lean-forward experience. It has shown that it can embrace digital opportunities, and is now beginning to understand how its content can be delivered and monetised worldwide in a way that wasn't possible ten years ago. As Darwin pointed out, you don't have to be the strongest to survive, you just need to be adaptable, and TV has shown that it can be just that.

But there are still reefs ahead on which TV could founder. Television may be adaptable, but it is not very good at changing course quickly. The big cultural difference I've observed since moving to Yahoo is that the company is superb at spotting opportunities and moving with unbelievable speed to seize them. Onliners are, in a sense, a different species, and their creativity is of a different kind. Television is brilliant at developing content that is both pithy and durable, loved by audiences – you only have to look at *Coronation Street*, still going strong after 53 years, or *The X Factor*. The world of the web is far more iterative, instant and judgmental. It tries out many different offerings – often all at once – and moves on fast, based on the utility of the product. If users want it, they'll find it and will show you instantly with one click and pass it along; if not, it vanishes almost in real-time. While television spends many months crafting its offerings and preparing them for market, honing the script, piloting, and trailing, apps can literally

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explode from nowhere, moving from idea to online sensation in only a few days or even hours via viral marketing.

These approaches can and should be complementary. TV and the internet can learn from each other. I moved to Yahoo because I am curious about many of the things that make the Web so attractive, most importantly the particular and precise ability it has to understand what its users want, in a way that TV can't: how a person consumes media, which brands attract him or her, what kind of ads they perceive as relevant. Television has made the major investment in content, but it is online companies who have invested in the powerful technologies and products that enable us to understand the consumer journey, and deliver highly personalized content and relevant advertising in an entirely targeted way that makes television's own audience metrics look prehistoric. I was and still am also fascinated because the internet is in some ways the always accessible library of the world. It has become an amazing platform for delivering content, and online companies are not only curating content but also increasingly creating it. Yahoo itself has grown from being a web catalogue and search engine to become the largest publisher on the Web, with more than 800 million users every month and more than 400 million monthly mobile users.

Surely this is a threat to TV? No: it strikes me that the world of television and the world of online content can meet in the middle. The idea that television will take over online, or online content will destroy television is absurd; the Web is a huge world in which both can happily co-exist, and enhance each other's businesses.

As yet, though they might aspire to be able to do anything television does, today, most online content creators don't have the same skill-set or experience as broadcasters. Netflix, LoveFilm, YouTube and Amazon have yet to trump the broadcast model that allows significant investment in quality content. Nor do I think that consumers turn to online as a first window for moving pictures. Yes,

for video snippets and quick video content, the web is the premiere address. Television's strength lies in producing and premiering top-notch long-form content. It is the perfect first window for original drama, a new comedy series, or a live event. But its big mistake is to imagine that it can thereafter control access absolutely and forever within a walled garden. When viewers seek something specific, they expect to be able to come online and easily re-access content, over and over, and in an ever-connected and changing real-time world, the consumers and their needs must be at the centre of a company's focus.

Broadcasters therefore need to be much more relaxed about where their content appears. There is value in availability, so it makes sense to liberate your content and then work out how to monetise it. Anyone who provides content that is significantly better, different or newer will always be able to charge a high cost per minute. But audiences expect different price points at different stages of the content's life-cycle: immediately after online release, they are prepared to pay a premium, but six months down the line they will only pay lesser amounts via subscription services, and after two years they expect to view it for free. At that point, any commercial returns to the creator will have to come via advertising or sponsorship. Nevertheless, the more you allow people to interact with your content in multiple transaction windows, the more money you will make. Television's future lies in continuing to do what it has always done so well, but it must explore different ways of making it available to audiences and it must explore these ways fast.

In a world of infinite choice, online can satisfy whatever individual desires or interests a consumer has. But equally we're human beings, quintessentially social, so we want shared experiences too. That's where the Yahoos of this world are coming in. We can provide you with the personally relevant experience. We have technologies in

Netflix, LoveFilm, YouTube and Amazon have yet to trump the broadcast model that allows significant investment in quality content.

place that are self-learning, based on user interactions and interests. Our goal is to deliver exactly what you want, when you want it and ideally across all screens. If you go to our homepage, you will find a never-ending stream of stories that are targeted at you based on the machine's learned knowledge about what you've gone to in the past, what you like to read or not. But on the other hand you also want those unifying moments, whether they come through watching Mandela's funeral, a World Cup Final or Andy Murray winning Wimbledon this year, or waiting on tenterhooks with the rest of the nation to discover the winner of *The X Factor*, and this is when you rely on your TV. All of those experiences are still incredibly powerful on television and in terms of big live events, TV is very hard to beat. Nevertheless, the real enhancement of such a TV experience comes to life when we connect our TV experience with the digital world. This already is a daily reality for the younger target groups: they watch TV and at the same time they surf the web on their tablets or mobiles, sharing these big TV moments through social media channels and engaging around them with their friends on Facebook and Twitter. So in a way, the two worlds are already interlinked and closely connected, and we will see more and more of this behaviour going forward.

We can co-exist in such a healthy eco-system, because there is enough advertising money to go round so that we can all build our businesses. Yahoo will continue to be a technology company that is media-faced and that has the consumer at the centre of everything. We are explicitly partner-friendly and have deals with some broadcasters so that they can make their content available through Yahoo in the same way that many have channels on YouTube, with an advertising revenue share. In the same way that an individual talent can develop itself as a brand online and export itself through Twitter and Facebook, so the UK's big TV channels will have to work with companies like Yahoo and Google, and acknowledge them as facilitators and publishers who will disseminate their material.

Will we jointly invest in content, via co-production deals? That's a fascinating idea. Of course I couldn't possibly comment on company strategy here, but whereas Google is an aggregator, and Facebook primarily social, Yahoo is an interesting hybrid that has always been curating content and to some extent also producing original content, from daily news and finance results to Fantasy Football and lifestyle video shows. It's a hub, a utility of daily habits, a personal experience like opening your own personal front door onto the web. In order to do that, we need multiple partnerships with whoever has the content our users want.

So television certainly has a future, but one that requires a symbiosis with online. Broadcasters are only limited by the scope of their imagination. There are many talented and brainy people who work in television, but I have found that the intellectual ability, capacity for hard work and ambition of my online colleagues is breathtaking. In television, I aspired to entertain viewers, perhaps outrage and provoke them into thinking about things in a different way, but my new online colleagues really do believe they are going to change the world. Indeed, they already have. Together, we can do something that is brilliant and inspiring for consumers across all screens. 🗣️

In a world of infinite choice, online can satisfy whatever individual desires or interests that you have. But equally we're human beings, quintessentially social, so we want shared experiences too. That's where the Yahoos of this world are really interesting.

Adrian Letts is the MD of the blinkbox's movies and TV business, the Video On Demand service acquired by Tesco in 2011 in order to boost its digital and entertainment offering. His experience as a former senior executive of Channel 4 and Vodafone provides background for his argument that media is becoming commerce and commerce is becoming media.

My prediction is that by 2024 the most significant gateway to your world of entertainment will be in your pocket. That isn't to say there will be no place for the living room TV set, but the majority of television viewing will be delivered via mobile devices. Why am I so convinced that this will be television's future in ten years from now? Well, let me begin by taking you back ten years or so, to the media world I remember circa 2004.

When the iPad was no more than a glimmer in Steve Jobs's eye, I was a former investment banker working with Vodafone, helping them to develop content services. At about the same time my soon-to-be business partner Michael Comish was at Channel 4, looking at ways to deliver on-demand TV to viewers. Most of my fellow Australians understand the notion of hanging out beyond the breakers, waiting for the big wave. Both of us could sense that television was changing, as the music industry already had, and that a swell was rising that would totally upturn entertainment as we knew it.

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The broadcasters must have seen the big wave coming, but to all intents and purposes they bottled, paddling instead for calmer waters where they felt safer. Terrestrial television might easily have gone the way of Kodak, promoting an irrelevant offering in an age of new technology. They saved themselves as the wave crashed over their heads by developing a new proposition – or rather, capitalising on an old one, expanding 'appointment to view' television and moving into event based formats like *The X Factor* (ITV), *Strictly Come Dancing* (BBC) and *Big Brother* (Channel 4) – all huge successes, proving that there are some things that television can still do really well.

Channel 4, like the BBC, could have made a lot of money from paid-for on-demand TV services. They opted instead to make iPlayer and

4oD free to the viewer (supported in Channel 4's case by advertising). Meanwhile Vodafone decided not to pursue the plan I helped to develop for them to deliver on-demand movies and TV to their mobiles. But both Michael and I felt there was a massive business opportunity waiting to be exploited in on-demand content. So we teamed up, raised a modest amount of venture capital, and set about positioning ourselves to secure the right kind of programming, build a technology proposition and get close to the customer, so that we were in the right place to surf the wave as this new industry gathered momentum. There was a moment when the broadcasters might have blown us out of the water, when the BBC, Channel 4 and ITV collaborated to develop Project Kangaroo, blocked by the Competition Commission in 2009. Its technology was cannibalised for the short-lived internet television service SeeSaw, which at its peak attracted two million users a month – but the service never gained the market traction it needed to support the investment.

I like to think that blinkbox developed at exactly the right speed. We raised enough money to prove our concept could work, and to secure the rights to distribute films from five or six major studios. But we didn't have so much investment that it would force our pace unrealistically; we had time to look around and plan. We managed to win some good deals, and the studios were keen to promote the idea of streaming paid-for content as opposed to free-for-all file-sharing. Most importantly of all, by a mixture of trial and error, research and instinct, we learned to understand our customers.

It's this kind of knowledge, I'm convinced, that is needed to ride the next big wave sweeping us towards 2024. It all boils down to what a customer is looking to do, where and on what device. It goes without saying that their primary aim is, and always will be, to be entertained. But the trick is to deliver entertainment seamlessly, easily, in high quality and in a way that is relatively straightforward to use, tempting them away from what they were using for entertainment before. This is, after all, how television grew its

audiences in the first place. At a time when people went to the theatre, the cinema or the music hall for entertainment, a TV set in the living room offered a novel, effortless, and above all more convenient way of getting entertainment.

Although the innate desire for entertainment remains the same, the demographic of our customers has subtly changed. At the very beginning we attracted early adopters who were prepared to put up with the odd bug in the technology because they were drawn to the excitement of the new. But as you move into the mainstream, the ease and quality of the service becomes paramount, and the average customer will be comparing your service to the standards they are used to: broadcast television or a DVD. If you fall short, they are unforgiving. In the age of Amazon, customer expectation is massive. A 95% delivery rate is no longer good enough. It has to be 100% perfect, because those 5% dissatisfied customers are far more vocal than they used to be, thanks to social media.

But we also know far more about our viewers than any terrestrial broadcaster does at the moment: usage patterns like preferred time of day when and exactly what they watch, how they watch it, favourite genres and so on, all tied in to individual customers – we have the ability to collect big data that enables us to understand exactly who uses blinkbox and what they want from us. Netflix, for instance, claims that it can crunch the numbers to spot what's hot and pinpoint exactly what it should be producing. *House of Cards* with Kevin Spacey worked brilliantly for them – a big budget production, costing upwards of a hundred million, it was one of the cheapest forms of customer acquisition, helping to add a couple of million new subscribers in the US.

I am not completely convinced number crunching can ever replace creativity, mindful of Henry Ford's famous remark that when he asked customers what they wanted, they told him "a faster horse".

I am not completely convinced number crunching can ever replace creativity, mindful of Henry Ford's famous remark that when he asked customers what they wanted, they told him "a faster horse". In the mid-term at least, blinkbox is not planning its own equivalent of *House of Cards*. But I do believe the data helps us deliver the right content with technology that is effortless and well-supported.

So where is all this going? The rapidly growing success of mobile and tablet viewing, for instance, has been quite a surprise, but it is possible to predict some clear trends. It's fascinating to watch how media is becoming commerce and commerce is becoming media. Tesco's stake in blinkbox points to that, as does Amazon's acquisition of LoveFilm. Net-a-Porter and ASOS are dipping their toes in online programming, while Vogue magazine is moving into e-commerce, but all this is as much about the customer relationship as about sales.

It's not a case of extrapolating from the data that people who watch Brad Pitt movies like to eat marmite; instead, what blinkbox has given Tesco is an *emotional connection* with their customers, a more *engaged* relationship than ever before. People are far more passionate about the movies they watch and the books they read than they are about a can of baked beans or a bargain microwave. After the initial blinkbox TV ad campaign, over 50% surveyed thought that Tesco was more innovative as a result of its association with the service.

To build on the appetite we have seen for movies and TV, we're moving into music and books: anything that creates a brilliant entertainment experience for our customers. Rather than three thousand stores, Tesco becomes ten million engaged games consoles and sixty million mobiles.

I predict the mobile device will be at the centre of people's lives. People will be watching television even more than they already do on their tablets and mobiles, and these will be the doorway to both

entertainment and commerce. What encourages this is dual screening: watching TV and at the same time sharing their thoughts about it with friends – or even shopping as they view on another screen, using e-commerce to buy the products that catch the eye. While men were the pathfinders in the early days of PCs and laptops, now we are seeing a huge take-up of mobile and tablet technology among women.

The challenge is to ensure the quality of the experience is consistent across devices, in terms of discovery, relevance and preferences – not easy when trying to keep up with technology that is constantly changing, at a pace that is accelerating. Success will be determined by the willingness to move fast, taking advantage of the technology and grabbing any opportunity that presents itself to win an edge. And without a doubt, things happen fast these days: when the Duchess of Cambridge was photographed wearing a Topshop dress during her pregnancy, word went round like wildfire and the garment was reportedly sold out within an hour.

When the power failed at the Superbowl, Oreo reacted brilliantly. The lights were only out for thirty-four minutes but in that time they had sent out a tweet with a simple picture of one of their cookies and the great line: "You can still dunk in the dark." That was a classic example of both lightning reaction and forward planning – Oreo's senior marketing executives were assembled in a 'war council' to watch the game in case a topical opportunity came up – and sure enough it did, helping them to millions of dollars' worth of publicity.

Supermarkets have always understood the market that matters is the mainstream, and what the mainstream wants is convenience.

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Too much of what we like is not always good for us

Liz Warner

The theme is why waste time? Why mess around with things that are boring or irrelevant? We will help you find the entertainment that suits you right now, to match the mood or situation you are in at this exact moment; we understand you, because every transaction you make helps us know you better.

So what does this all mean for the TV in the living room? There will still be a place for it, but I am not convinced its technology will continue to shape the development of the industry. Increasingly, mobile devices are likely to be where you discover what interests you, and then you will transfer that to the big screen, for the family to get together and share viewing. The domestic TV set becomes a home cinema screen, the follower rather than the leader of trends.

This is the future for which television needs to position itself. The big waves keep on coming, and you have to be nimble to stay on top. As Kodak found to their cost, who needs a camera when you have one built into your mobile phone? 📱



Liz Warner is Chief Executive of the independent production company betty TV. She argues that there is something faintly unhealthy about TV at present, a reliance on what has worked before, to the detriment of genuinely new and creative programme-making. The cultural middle ground is being squeezed, and there is little to attract young people to make a career in TV.

Not so long ago, I had a breakfast meeting with the controller of a TV channel in a busy café. Next to us was a table of fifteen or so exuberant twenty-somethings, toasting each other in beer, having a great time. They looked like exactly the people you'd want working in your production company: young, hip, bright, creative – television's potential future. I was curious enough to lean across and ask who they were, and what they were celebrating. "We're the editorial team behind a new online art magazine," they told me. "We've just launched our first edition."

Their eyes were full of excitement and their magazine (naturally I pulled out my iPad immediately and took a look) had edgy video and energetic language – "To all you fuckers who shit on high art..." It reminded me of production teams ten years ago. These were the kind of young people who would have been in television back then, keen to push the boundaries and challenge conventional thinking.

But what ambitious young person today wants to serve an apprenticeship working long hours for little money in an industry that has, increasingly, lost its sense of fun and adventure – and has become less diverse and more elitist than it was ten years ago? It's this that worries me about the future of television: where will the new come from? We've already proved that TV can survive the digital revolution. In fact digital technology and social networks have so far worked in television's favour, giving us new ways to share the programmes we love with other people. But how do we attract the brightest new talent, unless we give young people the opportunity to play with ideas and learn from mistakes, in the way the online creative industries do?

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Television has become awfully safe lately. Maybe it's something to do with the recession, TV's risk-averse tendency reflecting what's happening in the economy. The middle class economic squeeze has been mirrored by a middle-ground cultural squeeze. Take a look at what's on our screens, and you'll find a polarisation of taste: either big feasts or fast-food snacking, with not much in between. Box-set favourites like *Breaking Bad* or *Mad Men* have trained audiences to expect long series of their darlings, so television has responded with rich indulgent fare for viewers to binge on, such as *Broadchurch*, *The Killing* or batch-viewing several episodes of *Grand Designs* one after the other on the same night. For smaller appetites, programmes such as *Rude Tube* or *Countryfile* are full of short, undemanding items so you can sample just a few bites before jumping to something else. We may even be seeing the return of the magazine programme – though of course no one uses the m-word these days, guaranteed to kill any pitch, preferring instead to describe them as 'multi-item narrative shows'.

Too much of what we like, however, is not always good for us and there's also something faintly unhealthy about another recent polarisation on our screens. On the one hand, there's an obsession with the very rich, from *Made in Chelsea* to *Downton Abbey*, along with programmes that go behind the scenes at Claridge's and Liberty. On the other, there are tales of the underclass, dubbed by the media as 'poverty porn': *Benefits Street* recently drew four million viewers. The irony is that today's TV gives access to 'forbidden' worlds at the extremes of society, but offers very little that reflects the middle. Again, you can't help thinking of the way the middle class is being squeezed in the economy. Because it seems to grab viewers, I predict we'll be seeing a lot more of this too.

Squeezing out the middle ground isn't all bad, as the average isn't always interesting, but this polarisation and attraction to extremes makes us increasingly like the USA, with little or no room for subtlety within the mainstream.

This monotonous concentration on more of what's worked before means there is less room for niche interests. When did you last see ballet on a mainstream channel, or an unusual programme about the colour blue? The arts and other 'specialist' tastes are being pushed onto niche channels, as has already happened with children's programmes. As a result some of the mainstream terrestrials have become blander and more formulaic, very different from the ever-changing tapestry of viewing they used to offer. Maybe this conservative approach is a hangover from the recession too. Television has become like people who aren't move home and build the house of their dreams, instead staying put and investing in double glazing.

You can't blame channels for wanting to hold onto audiences by giving them the tried-and-tested, but I worry about this approach, and what it means for the future of popular TV content. One good reason for television to stop milking winners to death is that we should hold onto that sense of event which comes with a more sparing approach to scheduling. The anticipation of a big once-a-year series, like *The Great British Bake-Off*, adds to the pleasure of watching it, and you appreciate a series like *Sherlock* or *The Undateables*, made by Betty, because they leave you wanting more. Let's not forget Chris Evans's hit *Don't Forget Your Toothbrush*, which stopped after two series, and there were only twelve *Fawlty Towers*. People will seek out events that can bring them together and inject a bit more joy into their lives.

But my biggest worry is that unless it makes a place for the new, TV will atrophy creatively. I don't think television any longer attracts the brightest and the best. The cleverest, wittiest and most provocative brains are looking elsewhere, to not only digital but

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also live events. When channels dare not kill a show still getting ratings, where's the excitement in being a researcher on a TV programme plodding through its fifth series, when you could have so much more fun on a digital magazine creating something sexy and daring for *Vice* or *Tank*?

Yes, we still come up with big ideas and big formats, but they take up so much space there is no room left for experimentation. People no longer celebrate the eccentrics within the industry, the people willing to take a risk to make quirky and brilliant programmes, so there are no role models to lure young creatives to join us both on and off screen. Where are the new Michael Moores and Louis Theroux, the Chris Morrises and Ali Gs? Where does the next Oxbridge comedy set find an outlet? All the innovation has gone to the internet. We need to attract those people who will challenge us, and help keep British TV at the forefront of experimentation and edginess.

We have been the most creatively fertile TV community in the world. Programmes devised by British indies are exported across the globe. For that reputation to continue, we need to pile some more manure on the creative patch, investing in ideas, and accepting that some will fail. Innovation comes from throwing five things at the wall to see which one will stick. When I was working at Channel 4 I started an ideas lab, as an investment in the future; fifteen years on, the young people who emerged through that are now in their mid-thirties and playing leading roles in the industry. We need equivalent schemes to convince the next generation to follow them into television, just as games and mobile companies are now paying young people to come to them and play to devise new games and apps. I'd like the future to bring the fun back into TV and make it the go-to career choice it used to be for bright, hip young people.

My predictions:

■ The strength of narrative will become ever more powerful. We live in a world of information overload, and sometimes it can feel as if we are existing on a data diet of broken biscuits. People long for the intellectual nourishment of satisfying stories, and that is why *Downton* or *The 7.39* and other dramas pull massive audiences. There will always be work for people who can tell a strong story, be they writers or journalists.

■ The future will be an era of curation. We're in choice overload too: people want someone who can cut out the noise and help them make decisions about what to watch. We are no longer constrained by TV schedules - we make our own but there is a place for new arbiters of taste who will guide our choices. These could be the equivalent of the magazine editors or channel controllers of the future, curating an alternative schedule through Facebook or Twitter or some means we have yet to invent.

■ Documentary characters will become authentic experts, as has Dave from *Bank of Dave*, or Mr Drew, the teacher from *Educating Essex*, or the bosses from *Iceland* or *Liberty of London*. We saw this in the nineties with *Driving School* and *The Cruise*.

■ USA-style character-led series, such as *Cake Boss*, will grow more popular - possibly to the detriment of formats. These light documentary series are entertainment rather than taking us into new or forbidden worlds, and they burn brightly but burn out faster than a brilliant format, which can refresh weekly with new characters

■ Learning journeys will increasingly be a theme. There's pleasure and genuine joy in watching an authentic journey or real

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experience. It offers the enjoyment of escapism, be it a craft like quilting, baking, or building boats, or an adventure, seeing rare animals or simply learning to love.

■ Finally, risk will continue to be rewarded. Consider the plaudits for *Gogglebox*, or Channel 4's bravery in making a plane crash on TV, the bold scheduling of *Broadchurch*, or mainstreaming disability. Failing by making average-to-poor imitations is unforgivable, but trying something new when it strikes a nerve and wins hearts and ratings... therein lies success. 🍷

About the authors



Dawn Airey, Yahoo's Senior Vice President for Europe, the Middle East and Africa

Dawn was previously a British commercial television executive, whose past roles have included Chairman and CEO of Channel5, ITV's Director of Global Content, and President of CLT

Ufa, a subsidiary of RTL. She was the first Controller of ITV's Children's and Daytime Programmes, Controller of Arts and Entertainment at Channel 4, and Managing Director of Channels and Services at BskyB. Dawn is also Chairman of the National Youth Theatre. She has an MA in Geography, which she studied at Girton College, Cambridge.



Darren Childs, CEO UKTV

Darren joined UKTV – a joint venture between BBC Worldwide and Scripps Networks Interactive – in September 2010. Within two years, UKTV had become the nation's fastest growing television network and last year became the first and only British broadcaster to be recognised by Best Companies. UKTV's entertainment channel, Dave also became the most watched non-PSB channel in the UK.

UKTV has committed an investment of over £110m a year in content whilst recent financial results showed a record-breaking year-end revenue of £262m, and operating profit of £71m. UKTV has a truly innovative model, curating brand-defining commissions, high-profile acquisitions and the very best of BBC and Channel 4 content, embracing technology to deliver inspired channels to audiences through Freeview, Sky, Virgin Media, BT Vision, TalkTalk, YouView, plus direct On Demand digital services.

Earlier in his career, Darren spent several years in Asia, first as Director of Programming for MTV Asia and then as Director of Business Development at Channel V, part of the STAR TV platform. He was Senior Vice President International Networks for Sony Pictures Television International (SPTI), and he has sat

on the board of HBO Europe and Viva. Immediately before joining UKTV, he was Managing Director of BBC Worldwide Channels, overseeing a portfolio of international brands including BBC America.



Zoë Clapp, Communications Director UKTV

Zoë Clapp is a member of the executive board at UKTV – an award-winning media company and joint venture between BBC Worldwide and Scripps Networks Interactive Inc, reaching 42 million viewers every month. She is responsible for all creative publicity, corporate and internal communications for the network's imaginative media brands including television channels, websites, digital and Video On Demand services. The company's most recent financial results showed record-breaking year-end revenue and operating profit. Zoë graduated from London College of Fashion in 2000. She worked both agency-side and in-house specialising in youth PR, with a variety of clients including Exposure, Extreme Sports Channel, Warner Music, Emap, the World Cup of Skateboarding and Nike.



Bruce Daisley, UK Director Twitter

In a survey of CEOs and MDs in 2013, Bruce was named the 'Fantasy Hire' that most leaders would like to make. He joined Twitter in January 2012, after running YouTube and Google's display advertising business in the UK. He was previously Digital Sales Director at Bauer Advertising, Chairman of the Association of Online Publishers' Commercial Group, and UK representative to the Cannes Lions Festival. In June 2010 Bruce was given an award for making the 'Greatest Individual Contribution to New Media' by New Media Age magazine, after a poll of their readers.

His interests include work culture and pop music.



Dave Evans, Chief Futurist Cisco

A Cisco veteran, Dave joined the company in 1990 as employee number 398, charged with deploying the company's first-ever web server. He now leads a team which helps customers incubate new ideas and translate vision into value, and is also Senior Director and Chief Technologist of the Cisco Internet Business Solutions Group (IBSG) Innovations Practice, working with leaders of some of the world's largest companies.

Before joining Cisco, Dave held varied IT positions at both AMD and MMI. He is an industry expert on emerging technologies and whether he is acting as futurist or chief technologist, his guiding principle is the desire to make people's lives better.



Dynamo

Having been introduced to magic by his grandfather, the young Steven Frayne developed his skills as a means to fend off bullies, quickly gaining a reputation as a unique talent with his incredible sleight of hand. Steven appeared at the New York Hilton during Houdini's centenary celebrations, where he performed in front of his peers including acclaimed magicians Aaron Fisher and David Blaine. After a stunning display someone in the audience shouted, "This kid's a ****ing dynamo!" and the name stuck. Dynamo's debut TV series *Magician Impossible* was first broadcast exclusively on Watch in 2011 and quickly broke all viewing records. Total viewings now exceed 18 million. It won Best Entertainment Programme at both the 2012 and 2013 Broadcast Awards and was nominated at BAFTA, RTS and National Television Awards.



Justin Gayner, co-founder and Creative Director ChannelFlip

Justin is a writer, broadcaster and producer. His career began in traditional media, writing for publications such as the Daily Telegraph. He created TV formats and produced several comedy series for Warner Music Group and MySpace. In 2005, he became the commercial director of QI Ltd, the company that produces QI, presented by Stephen Fry. He left two years later to start the UK's first online TV channel for men, ChannelFlip, with co-founder Wil Harris. He is now the creative director for ChannelFlip as well as the host of their online film review show, ChannelFlip Film.



Tony Jordan, Managing Director Red Planet Pictures

Tony Jordan was a market stallholder when he submitted an unsolicited script to the BBC. He was taken on by *EastEnders* and has never looked back. Over the next 18 years, he became lead writer and story consultant, creating some of the show's best-loved characters and storylines. Tony created BBC One's long-running hit series *Hustle*, about a group of enterprising con artists, and co-created and wrote the award-winning international hit, *Life on Mars*. With his own indie, Red Planet Pictures, Tony is has developed numerous projects, working with established writers and nurturing new ones.



Adrian Letts, MD of the blinkbox movies and TV business

Adrian began his career as an equity analyst with JP Morgan, and went on to become Head of Products at Vodafone. He co-founded blinkbox, a Video On Demand service, with Michael Comish. blinkbox was launched in October 2007 with the backing of a number of venture capital firms.

In 2011, Tesco acquired an 80% stake in blinkbox.



**Jon Thoday, Managing Director of
Avalon Entertainment Ltd**

Founded in 1988, Avalon is a multi-award winning entertainment and talent management company with offices in the UK and US. The company has discovered many acts which are now household names, and has an international reputation for cutting-edge comedy, theatre and TV production. As a producer he has been responsible for many successful shows including the BAFTA-winning *Harry Hill's TV Burp*; winner of the RTS and Rose d'Or awards *Not Going Out*; BBC Three's highest-rated entertainment show *Russell Howard's Good News*; *Fantasy Football*; *The Frank Skinner Show*; and many others. Jon is a graduate of Cambridge University, with master's degrees in Natural Sciences and Biotechnology and Genetic Engineering.



Liz Warner, CEO bettyTV

Liz Warner started in print journalism as a feature writer on newspapers and women's magazines. Her television career began when she joined the BBC as a researcher. She went on to become Editor of BBC Two Factual Programmes, and a commissioning editor for Channel 4. In 2001 she founded independent production company betty, known for its high-quality prime-time factual programmes for BBC One, BBC Two, BBC Three, Channel 4, Discovery and Fox. It makes hit shows including *The Undateables*, *The Food Inspectors*, *Obsessive Compulsive Cleaners* and *Bear's Wild Weekends*.

In 2011 betty was bought by Discovery Communications. Its shows have been sold to more than 63 countries worldwide.



Ten years ago, UKTV published a book of essays containing logical predictions about our industry in 2014.



Now, looking forward to 2024 we explore the development of programming and technology and predict who will be the winners and losers of the next decade. This book contains the perspective of a broad range of thought leaders – from creative programme makers and on screen talent to the new broadcasters and professional futurists. It provides a vital roadmap to the future of television.

With an introduction from Darren Childs and essays from:

Dawn Airey • Bruce Daisley • Dave Evans
Dynamo • Justin Gayner • Tony Jordan
Adrian Letts • Jon Thoday • Liz Warner



MONEY

TIME

