



PROCURECON FUTURE OF TV WEBINAR

VIDEO TRANSCRIPT

Good afternoon and welcome to this ProcureCon Future of TV webinar. My name is Nigel Gilbert I'm with Accenture based out of London in the U.K

Today we want to discuss all elements of the value chain what's changed maybe because change across broadcast and T.V. , as we know from the last 12 to 24 months a great deal has changed not just the consumer, how they consume the content but also how a console is created. And that modifies concept and actually how the brands can also that print gauge what production requirements they have whatever value chain looks like well.

Before we get into it now be up panel to please introduce themselves.

Hello Nigel! My name's **Graeme Adams**, I am head of **Media BT** I look after all BT groups paid for media operations. At BT we operate 3 different brands we have BTE, Plus Net and we're active across consumer and B2B markets, our activity covers all bases you know we do brand advertising consideration and direct acquisition activity as well so you know our advertising and media keeps the sales from my procurement colleagues and pretty busy .Thanks for having me.

Hi I am **Pete Markey**, CMO, **TSB Bank**. People are here to see a move to be back and look after all of the brand marketing across UK.

Hi everyone! I'm **Lara Izlan** is non-directed advertising and it takes at **I T.V.** my team and I are responsible for addressing insights, targeting products, Measurement solutions and

advertising.

Hi Nigel, I am **Jonathan Lewis** head of Digital & Partnership Innovation, **Channel 4**. I'm responsible for non-stop digital, shifts, social media, partnerships, content and social management.

On the phone. Thanks everybody I think we got a little bit of feedback so if we can all make sure that we are on mute when we are not talking.

This is my first virtual friends webinar, I am learning as it goes, gets to go so please bear with me or us I'm some of the panelist have been here before so we 'll see how it goes.

Is the rapid change that we've seen over the last 6 months as discussed at the top that we know the law is changed in the world of broadcast on both ends of the spectrum but over the last 6 months that's been rapidly accelerated and impact And across again as we mentioned the entire value chain. So if we can start with the brands, what in the main challenges and opportunities that seen over the accelerated period, Graeme and Pete?

The change over this accelerated period, we briefly stop our usual approach time and at the time of Covid we are worried about Call center capacity you know Chamish more tolerable customers we had a lot of people calling up and BT sport subs that we needed to talk to and it just it didn't really seem right to try to keep advertising the way that generates a lot of calls into our service centers when we knew there were a lot of people that needed a lot of fans for current customers who needed a lot more I we



did restart very soon afterwards you know several days on some channels.

And a few weeks later on others and we gradually and carefully run our spend our back up on our acquisition bibles and they were back active across channels and then you know media and you know about us from on my acquisition point of view from our brand consideration point of view and we just wrapped up our plan for 2020 and I started again actually. We knew we had a great plan but we knew we needed this different time and we had to recognise that times change them to we look to dig to new things you know on. On EE we put up a campaign giving 3 data to any chess workers and we had just at the end of March and. April

On a BT side, we also did a new campaign but what we wanted to do is help people get more technology evolve and on a lot of people were struggling with us before we had a role to help. And we partnered up with I T.V. with around the cds of what we call the top take temps seceded practical gates to help solve issues. That we knew people were having to get locked down you know we had to set shades to see what people were searching what they needed a hand with them what they were struggling with and we did a series of Gates to help them used you know some of our brand ambassadors and partners to help us with Clare Balding doing a shoe or a short piece about who to say self what's up which my mom won't let useful and you know it started to video calls off the back of it David volumes that you know as well as at a t.v. stars a kid's author and he did a great piece about keeping your kids say active for the middle school week Peter Jones doing a piece about small business trips and attempts all in with about 15 different games be Nonono every day we ran a slow morning because it was a lot fewer changing big peaks in viewing across the days so we took a slow at 10:30 and then we did something in The 615.

I even used it to slow so you wouldn't normally run advertising and but you know it but it worked really well for us we're on the few weeks and I'm tracking measure sure it works well and any

difference to a campaign from from is not something we usually don't it's very different social media behavior but you know through to the constraints we had to and we did something that was really different and I think it was helpful for people and it worked well for our brand.

Not you're building off from what Graeham said I think for us as a as a business entity they still remained a really important channel used differently and I think our campaign structured approach change we were planning quite different bit of activity through the period of the lockdown but then to the exchange you reach step back and listen as well as they we could so that off to the spa because it was just with me through other channels we still have it's amazing and content channels really to.

Communicate ways we can help and we do that by stepping about listening to will be Barofsky also people worry about fraud people worry about I'll they see people worried about be able to access our services when branches and call centers were busy and there are a lot of pressure so we created 3 bespoke many apps that we filmed to get in this isn't unique we didn't do the same style we actually sent countless people sometimes we thought remotely We put those out and I have more to performance a tracking than optimize the ones that are performing the best the best I'll straight the questions that customers have and then kept those running for 3 or so months just through the critical period of a lot of them as well so mixed to change quite a lot but it's all about listening with mapping sponsor if I think I'm cheap yet they were pretty going to systemize it working you know under pressure and with different constraints and still be able to get work done and what that really quickly and a follow that was going to mention is office pension to add from that programming which we did is a combination which you don't you can charge for the the program about not lockdown heroes that was a really great project to get involved with really great to help your fund and produce a program that recognized the amazing people who they've done and we referenced but I did some content around that simmers Oprah not CBS. as well



sink rate to actually innovation opportunities came on the back of the difficult situation promote down as well.

Very good and also a very unplanned synergistic affiliations we were able to call out all the traps just just very much before we.

We only go where we want we want to use ahead of time we're able to just briefly touch on real science what changes are in the ability to actually change in rep because of the rebels. Because of course and in the context that you just described Presumably you need a lot more treatments. And you need some sort of agility about where you can actually then put out.

How did you find that the changed. Apologies Please go ahead Graeme

We, I have so from my point of view and Some some similar to some of the stuff that piece said actually we had to have. You know we were sending cameras into people's houses to do that it was really difficult to do the filming I'm fortunate I don't actually have to do this film but I know that it was not what everyone involved and you know found it difficult Similarly we were keen not to just sort of replicate as in cold and we wanted to get as close to this overall experience as possible. And it was you know it was challenging and there you know I think the people who are doing the I choose do what Haven't they do you call in to do them because they can good people so you know it's tricky tricky to make happen.

Pete, Yyeah I can relate to a lot of French I think I am able to show radiation have actually really had to work well remote leadership because none of us had done before and the new regime created work and created looking at commonsense rates to try to match decision has never done so your cities do pretty quickly so actually you usually have a long so the period before us all at actually when you go actually the same 2 weeks time you think of it we haven't done that before and so it was incredible being able to sit to do that and also keep the quality bar because you know anyone can produce

something in a couple weeks that's not very good I think producing something with a quality bar is Kat's high you know high end of the brand still good concept and also culture the sponible the few feet to change you know it's really important as well and again with the i.c.m. shelf or spread with great working directly with media around as helping see the editorial of the concept where that was going to be involved and then our you know how work with with sync with that work with that was was very powerful as well so but it was all about us working and working out with a lot of Joe's him he's like very much so in one sense of moving across that not speaking of the media writers that Lar starting with the 8 what are the key the key changes challenged opportunities that you see particular over the last 6 months.

Myself, well I think we've talked a lot about changing consumer behavior Nigel you mentioned it right right up front and it has been discussed in in depth across many of the stocks of women webinars and of course the latest off com report you know provided a lot of insight I think one ones that in particular are really really really really allumninating so they compared the total consumption but day in April this year versus the same period last year and it and it was up something like an hour and a half so from Defender 5 hours a day to 6 and a half hours a day.

And so that's you know there's a lot it's been said about about about changing and changes in consumer behavior I think it's it was a noting that you know we've seen these you know changes and in consumer behavior happening over the last few years or this is this was already an evolving phenomenon I think what we see in this year is as you rightly said there's been a rapid acceleration but also huge variation in consumer behavior so from a data and analytics team perspective it's it feels a little bit like we've observed you know but then she uses of change in just a matter of months you know that in terms of acceleration but also in terms of the mix you know if I look back on the last 6 months we've seen at least 3 phases I would say you know already locked down obviously when people



were consuming a lot more live news and current affairs programs because they were keen to be informed then that shift towards more entertainment content for you know perhaps more escape you know this keeping from the day to day easing of lockdown in the summer we had a wonderful summer this month but it also coincided with the limits in you know our ability to do certain programs so there was another shift than oversea now we're.

Action is ramping ramping up again but there's lots of uncut uncertainty around restrictions So consumption is changing again so it's not static it's not static by any means and are both Graeham and Pete use the word flexible and agility and I think this is the main learning coming out of this you know how do we keep our pulse.

I'm going to say that data is important is the fit but how do we keep pulse of what's happening how do we you know find seams and opportunities in in this ever changing you know consumer behavior and why the economic landscape so that we can create you know ongoing you know continued good programs good service for for our viewers but also highlight the opportunities for for advertisers punches in customers as well.

Thanks Lara.

Jonathan, what's your view? that's very similar to Lara actually I mean I suppose that is you know as I look at the last what steps are a monthly kind of and in a few phases the initial phase was very much you know the panic has space in kind of light March April May What we're saying and revenues decline circus skills who is it the sense that there was a kind of like a massive. Cost base as quickly as possible so if the 1st thing was really just Egypt would restricting our Internet down by 50000000 which is quite significant whosarat use Netflix was one of you know that was almost ready so bracing what we thought was going to be a very very difficult year and then we had the sort of the 2nd faces we experience which is always lie when the innovation case and take our own way but what

he was talking about we just we just did things differently and we commissioned we were very much with thinking about how we can drive innovation in the current circumstances under the restricted budgets we would still commissioning consent through that kind of a lot of Different places price in Paris up absolutely a great example of right through show resonates in the audience it was just Grayson Perry in his house with his wife community has an indication with the audience we did we need more and more and funny programs are funded shows to net and we've done probably in that in a 6 months previously who is stimulating a market with advertisers it's Yes And coming up with new ways of of working in commissioning which is really really exciting. you know say still trying to get out there and launch new products be that it's a product so certain watching out for us yes social initiative and really what that's done is that's kind of about us kind of take a different view on how we have an approach to Mission consent.

And just really proves that this is part of moving forward which I think I've not got more opportunities than maybe maybe a place and I think what we're seeing is this space is crazy situation where we've got a bounce back so we're now seeing.

In here fall there are say and I say this very intensively we're seeing revenue growth in Q 4 in television also more of who is in record growth in viewing so I would say and that's not not just across and maybe all who it says is the young This Is It seems that those that are arguably coming back TV it because it's a safe place it's a place where there's definitely reengaging and we're seeing I missing shows performing at this hearing sense your box sets you at a time in a real them off a back of probably the greatest the best example and where I came back so screams back of was filmed in not hermetically sealed production sets over the late summer but we pulled it off and came back in a storm 11M and it's.

And that's the biggest audience on Channel 4 since 1985 and Oh my god and I am I am not



trying to say that we have Covid, we've just learned a lot I think swing back into engagement with A.V television was a vote another night and talked about and you know its digital growth and full of that I have here in the summer where we are seeing people bingeing on box sets and young audiences watching lots of other telly in between us for the 1st time and you know one of the virtues of sex is you know they're so young now 15 to 20 year olds watching shows that I've never watched before.

So yes it has been it's been a really interesting year learning's feel that you know what I hate TV is a result in a much stronger price than it probably was the end of the love I love this site you're bringing new audiences back to see it partly because they're forced to stay and.

It is these idols that people a year ago would have said are drifting away all that being lost and actually it's bringing new audiences back up differently experience the bike off revolution in my house and I can tell you that that's up to the fact that this great insights for more for me that will lead if we don't take thing forward then and this idea of course that we we all law as consumers and of course in our business lives over the last 6 months there is going to an extent there for going to be a lot of things that will stick.

And that we're going to have to just get used to and of course this notion of acceleration and tool system s or new competitors we haven't really talked a lot about. Up to this point and of course media itself. If we come back to its agreement pay grandfather with you. Can we get a sense therefore of how you see screen hooks it into the future but it feels it let's say the next year if you like what do you think you're going to have to do differently. Well yeah I mean we're we're we're still back on television we vest you know we invest a lot into it and.

It's you know there are some really cute examples so. You know some says some good examples of big programs that are doing well for a range of different what is. What one of the things we're spending a lot of typing trying to get right is just how and How to manage our t.v.

spans across the different age groups we are seeing different performance and you know if we are.

Doing our campaign it may be an average frequency of that tape and we see up over 15 for a \$65.00 plus e's and that didn't need a 5 or 6 or 16 force and that's a massive change and for some of our brands that is a big issue and so we're having to intervene a lot and we're having to go longer and people were having to make that work in all its cond pulling in parts far harder than we can we've seen before I mean we've got a plan coming up 600 ratings or net reach level is going to be actually for the 1st time under about 70 percent for some of the scripts but after so we're really having to dial up record investment to compensate for that.

And so I think what it means we're having to really.

Get into the tactics of the way we use t.v. and that those decisions are so important know that the excess of crash skills that you that you could place more so the mix of buying or audience is that we're bringing to bear in the comparison audiences we're going after i feel we're having to work these far harder than we have in previous years and I think really you're seeing.

A talent that we like you know for our internal teams and the agencies to help us with this is knowing when to when to broadcast and when to use addressable audiences because they're the answer is in the plains but the more that we can get understanding of how to play in board broadcast and addressable channels the more success will be so real neat for craft skills in Bulworth which is you know craft skills and t.v. planning but also craft skills in the digital space and Working out how to put together the various different forms of broadcast or forward online video and some of the social channels video that we ask you to bring in those together to that base to Thanks thanks Graham people what do you think.

Thanks thanks Graham and Pete what do you think.



Yeah I mean I think it did for me if I lived in a difficult 6 months will have anything to take out of it some of the speed chose it we've so developed collectively and developed their agencies I want to keep that continuing and I think we're going to need it because as you said knowledge of there's no crystal ball here and the environment is constantly changing so we're going to need as brands to be able to have it be your is an agency to respond even faster the better you know very very uncertain climate and environment and the immigrants. I do think that the i.c.c. data is going to come more moral in prevalence you know 1st of all through traditional buying ways but also yes Graham same with how you buy would insist problematically through the likes of you know we've just done hat which is Sunday with info some we're using Office party data to buy you know audience History Channel 4 for example you know through through your child falls for a day and other platforms you play radio or there were taxes so a lot so I think they were really for me exciting I think still is being celebrated is you know the need to trust the brands to focus even war on the latest technology story Jordan says in the Broadway play that makes our budget more effective efficient. Cars also I think the sort of 3 to put stuff we're going to need as brands to respond to the changing environment of all the next phases of Covidien many lockdowns bring as well I think that you know this is this part Castle pretty aged badly but which will lock downs as is the current situation right now you know as you do we get to a point we're going to need regional treatments beyond what we're doing you know on a city by city or region by region basis which some media allows you to do better than others so so we're going to be about places yeah that's that's great insight from both each up there in this notion of the the use of dates. Across the platform and Graham as you were mentioning as well putting it in from social channels as well.

So part of it is necessity of course apologies this ability to now address this media I think it will more so than has been the case before well it will be pretty soon we'll see well for time so

happy days on that note let's move across lower against Ali. Can we get some can get your views and what you think the next the biggest priorities if you like challenges opportunities are going to be for us in the next 12 months or so I think the learning that will stick which is something everyone has said already you know we basically got a crash course what it means to be flexible both you know in terms of our internal ways of working but also how we you know how we do business how we you know as I t.v. how we rebuild content how we work with our partners and customers we all know that there's need for flexibility is not a new thing.

You know and I just you mention new new competitor as you know and they're not on the horizon that he or they have been here and if anything this period has you know sort of been a bit of a catalyst for everyone so we've all had to up our game pretty pretty quickly.

So this is these market dynamics are nothing and nothing new you know the writing was already on the wall as it were I think you know from my T.V.'s perspective we've obviously made some big technology investments in order to get ourselves into a position to you know to compete effectively to to continue to you know run. Effective feasible business models for now and going forward obviously the you know we've recently launched our program at a media platform plan b.

You know the investment behind this was very much you know driven by that ambition to be much more you know much more flexible for and or for many more features that that advertisers need in terms of being being more agile and more you know performance and return on investment focused so in a way that you know it's a good time for us to be talking about about you know the new technologies the other piece rich both Pete and and Graham mention is the importance of data again this is this is nothing this is nothing new but you know because of that.

You know.



You know the investment behind this was very much you know driven by that ambition to be much more you know much more flexible for and or for many more features that that advertisers need in terms of being being more agile and more you know performance and return on investment focused so in a way that you know it's a good time for us to be talking about about you know the new technologies the other piece rich both Pete and and Graham mention is the importance of data again this is this is nothing this is nothing new but you know because of that.

What I know that John and the team at Channel 4.

Are also working with them you know we've we've recently completed commercial partnership with him for some and a strategic investment in the company and and it is exactly that that need for for us to be able to collaborate on the basis of data with all of the change happening with all of the threats of of you know kind of new competition.

New new you know different competitive landscape that is as everyone said just accelerated You know we need to think about collaboration in a much more proactive way.

And and you know our our our investment and partnership with ins and for some very much underscores is ambition to be able to work in a data privacy compliant way to bring data sets together both from an activation perspective for our advertisers who are looking for a return.

On investment but also potentially working with other media owners and broadcasters another data partner so that we can start to build a more collaborative approach that will hopefully help the entire ecosystem so you know definitely on the technology and data friend you know a lot has been done and a lot will continue to be done I think in the next year or 2.

Amazing!

There and that we may even get the chance to get a quick takeaway from our friends or to the process well before you and I'm just going to censor some of the other new tools and skills that I think you may want me to develop on their site . What do you think John?great know it's going to hear from Laura and says What I to be doing I think is very much the broadcaster's job really at the moment says Dr so they should both think they Syrian and the same and programatic by saying some is live in peace and this session is an intensive animal as well who did this sort of things that we've been doing about space now than almost any of immolation sea to date certain and some of us of course and also you know that the far right I think.

Most of the importance of it and 1st part of that a snippet it's the full current super room there right that extra mass that suitcase one or 2 uses on all 4 uses it basically on your own despite segments we believe this but you can change it in and I think Max's best definitely is the trajectory of travel for us as a business as we move forward I think because the next 12 months we've we've dozens of overnight issues now their operational says test day was here 40 over the last 6 months or so and the ambition is to really expand that and start the trip back hopefully so meaningful attribution to those so those maps data points so we can really say out media buying on a soap and also as we move back into principle Linea can be can.

Deliver you know real return on investment I think the other area for me is around cross measurement because it's so in linear I think that's the thing that we need to really be focused on.

I'm sure Graeham and pete are asking the same question you know how much Ingram it'll reach is my vote campaign delivering and versus my linear campaign and how is it measured on a campaign by campaign I says that d.g. prepaid its.

Linea and the reach on the linearity So unless



something it's me coming on Q1 or Q2.

But proposition which all broadcaster are going to be alarmed us will definitely see some significant shift and hopefully not send sensitive the confidence such as in includes not as investing across you know mostly to both linear and digital information spread how how we commissions milestones name back into Page point arounds driving advertising funded programming in commissioning I very much feel the narrative has changed in Channel 4 in terms of the importance of encouraging brands see the kind of fun commission with us for not just shows that might seem show to pay current balance time or late night these are you know how can we not unities brands but it can have long term and meaningful partnerships Commission formats across year across most years I think I've been in those conversations rounds and influence of Satan who resides really and thanks Will them to know a lot for me greatly matter what we ask Grahem and Pete.

If I are indeed thinking about this notion of cross-platform because now of course people don't just consume channel 4 for I.t.v. by the telly they're almost all devices and grain 1st.

Is this party show yet says We spent a lot of time debating this and speaking out tests for you know where we're looking at Channel tests on You Tube seeing how that works with t.v. in the right way calibrate the actual you know the way some of it is shown to said we're steady interested in that sci fi stuff how that will work you know linear with broadcaster forward we look at data from their audience project the Canet t.v. plus online channel.

And I think we're all waiting for Bar been able to come alone but I probably say there's for just from that there's a lot of different types of measurement that we're having to get our heads says appetizer side I think actually.

I'm fairly interested in the work that is on the b.f.a. we're doing with Origin and I as a couple world peace that looks at giving the overall

overarching measurement piece you know it's not trading current state of the canal planning tool that will help understand that trust has just got arm strength that you know the change in consumer behavior that there is and how to just work out the different leaders and t.v. and forward in all of its guises how they would work together and how we can so that the right brain lane so that different briefs that we're looking at so I took at you know anyone that hasn't had a look at Origin I attend courage them to to do so and really good success.

Just because very but we're going to be up on time very much to apologize pizza similar sentiment that yeah I definitely think racism measurements get people particularly when budgets are under massive pressure and I think it's only really to keep working with the media is under there were Graham says and I think it's more important now that.

Wonderful well done I don't believe we've managed to time it so fantastically well yeah.

And so well to well turn everybody.

And I think this is going to really really interesting discussion and often we forget about some of the more important elements of the value chain just think about some of the consumer but in this instance just remind me to thank Brian pate Nama and Joel thank you very much for everybody the c.e.o..

Go over everyone.

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