



Surviving and Thriving in an On-Demand, Digital World

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Chief Commercial Officer

Customer Engagement, Transformation Summit: 15th Nov 2018



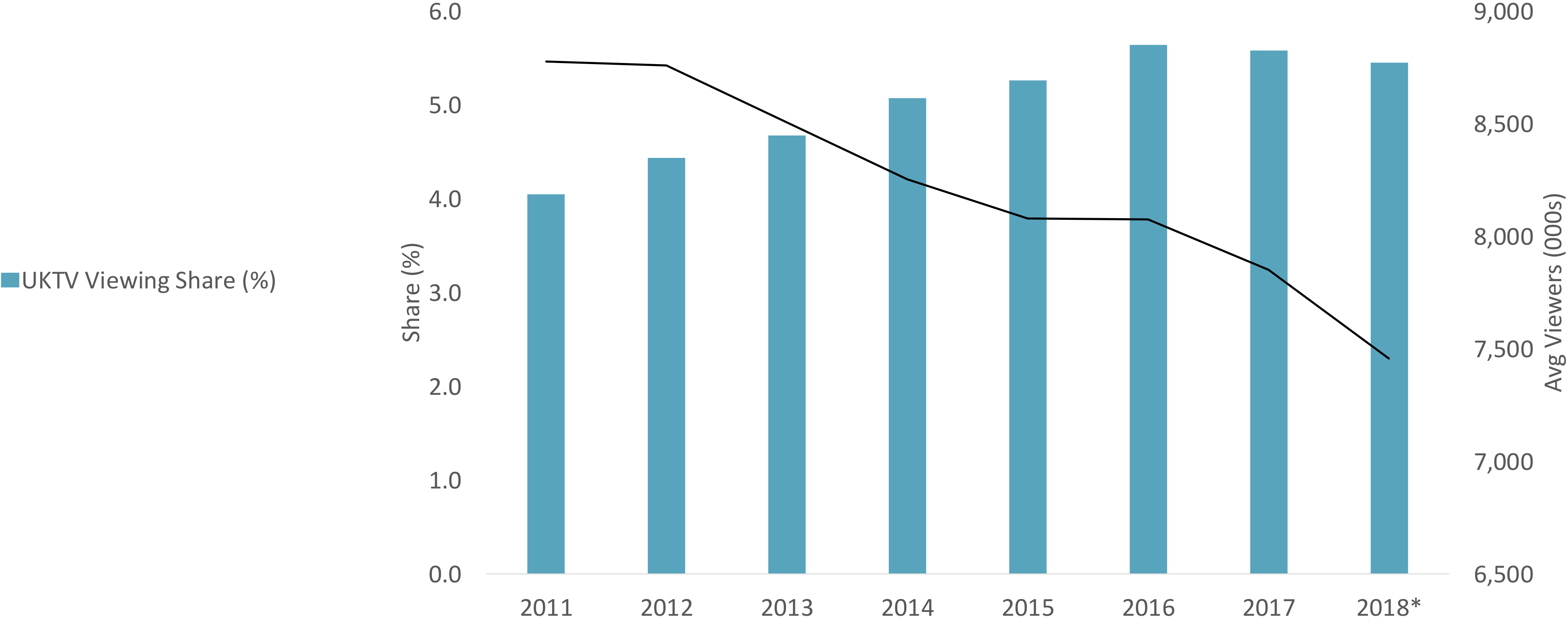
What is UKTV?





Consistent, market defying growth - despite being linear only until 2013

UKTV Share of viewing vs market



Source: BARB TechEdge, 2018 is Jan-Oct

At risk of being swallowed by the tide of change





User expectations had changed with the onset of digital platforms

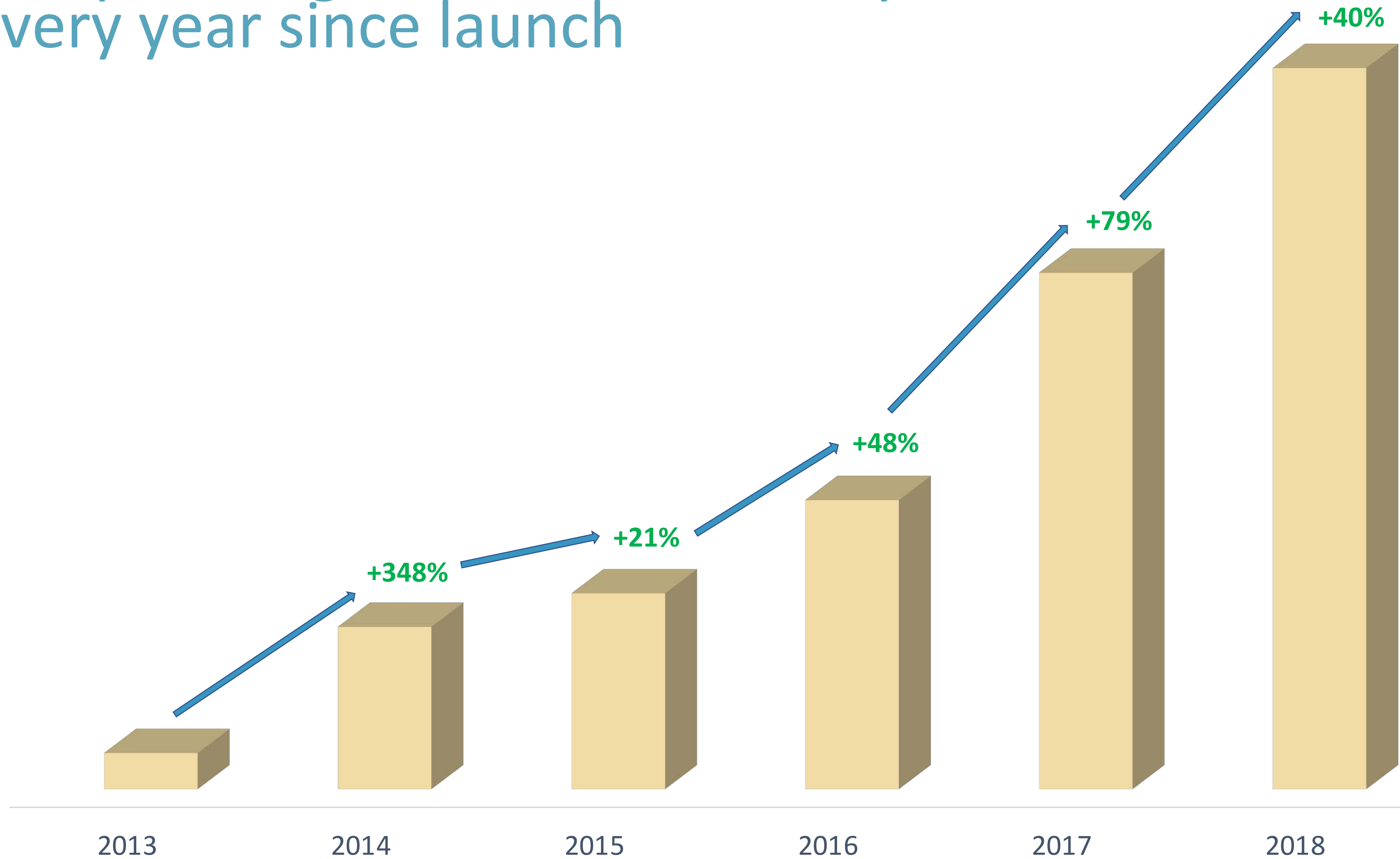
- The BBC brought the concept of Catch-Up to the masses, with the launch of the iPlayer in 2007
- Pay TV platform raised expectations further with the introduction of PVR & Box Sets



The Solution...



Exceptional growth on UKTV Play
every year since launch



UKTV VOD Views 2013 - 2018

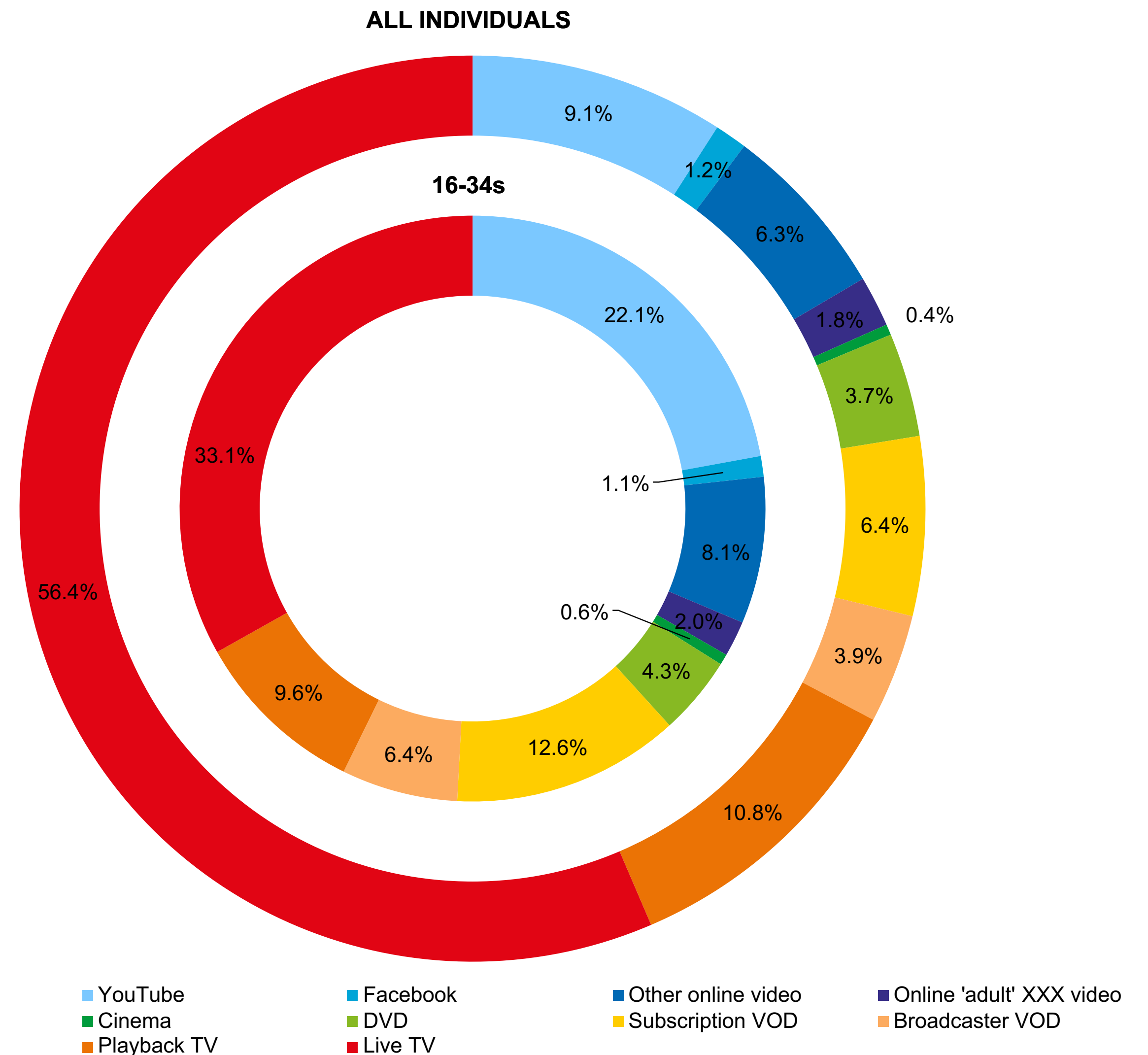
A fundamentally different landscape in which broadcasters have been forced to rethink our offer & up our game

Average video time per day

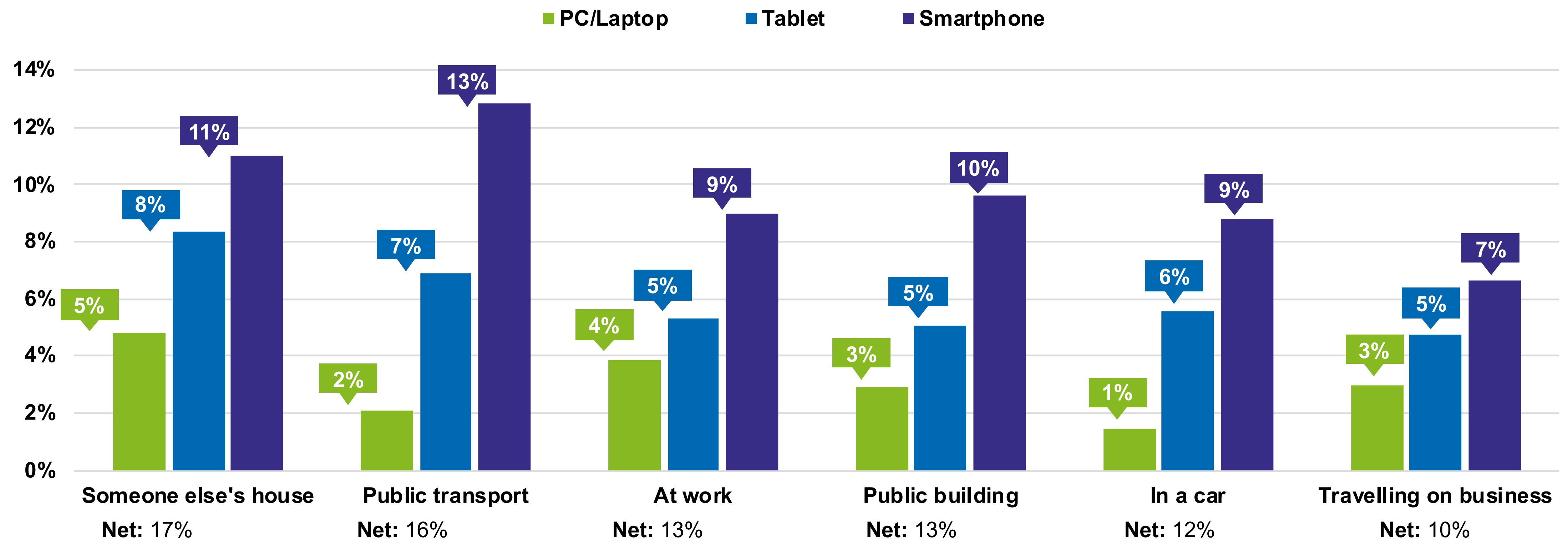
All Individuals: 4hrs, 39 mins

16-34s: 4hrs, 19 mins

Source: 2017, BARB / comScore / Broadcaster stream data / OFCOM Digital Day / IPA Touchpoints 2017 / Rentrak



Digital change has brought new opportunities where content & product utility are the key differentiators



Source: Screen Life: TV advertising everywhere, 2014, Craft/Thinkbox



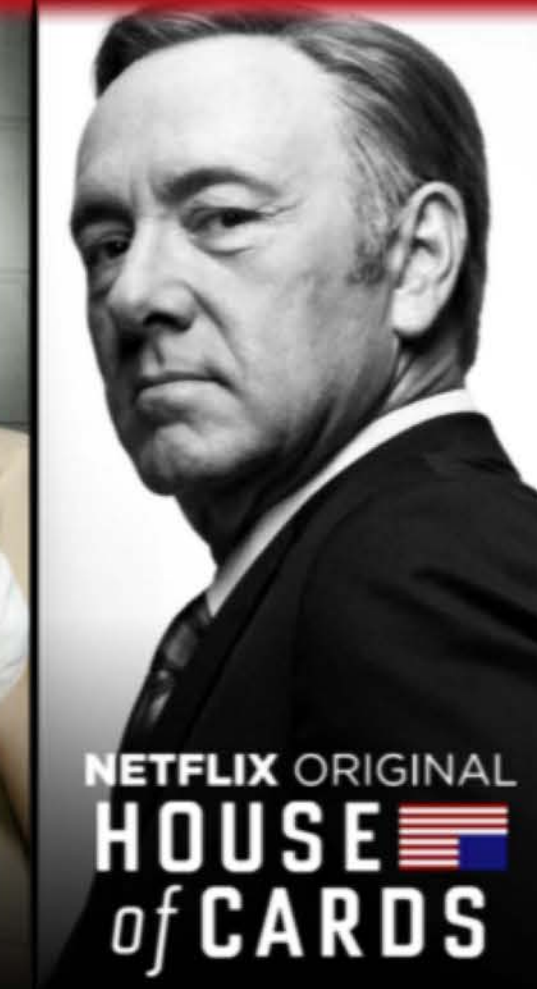
Business and operational strategies are changing

- How has UKTV adapted / responded?
 - Step-change investment in original commissions
 - Box set stacking and VOD previews / premiers
 - VOD exclusive content
 - Co-productions & collaboration
 - 3rd party content aggregation

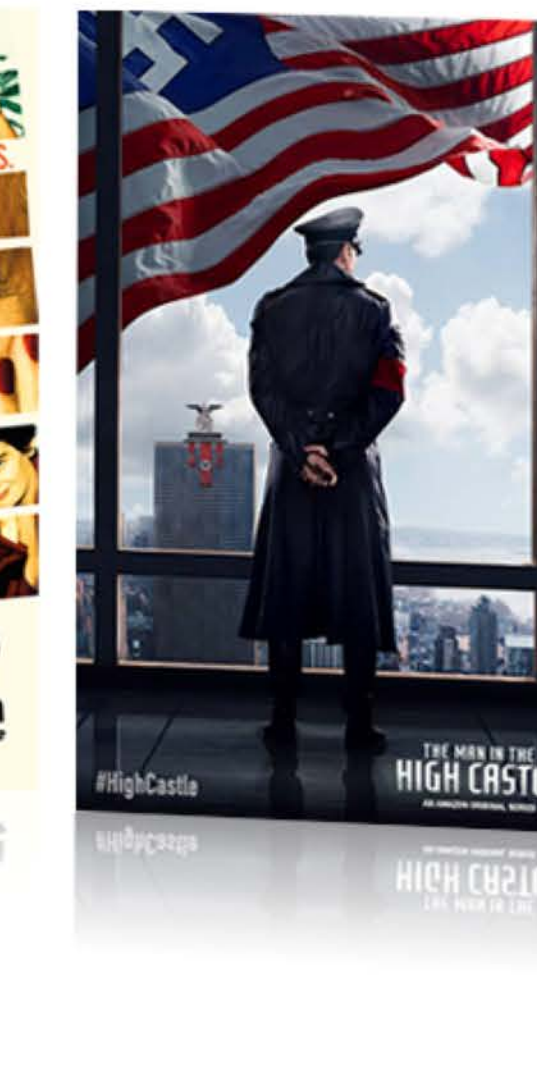
Game changing utility & a re-writing of the content rulebook



NETFLIX



amazon
Prime instant video



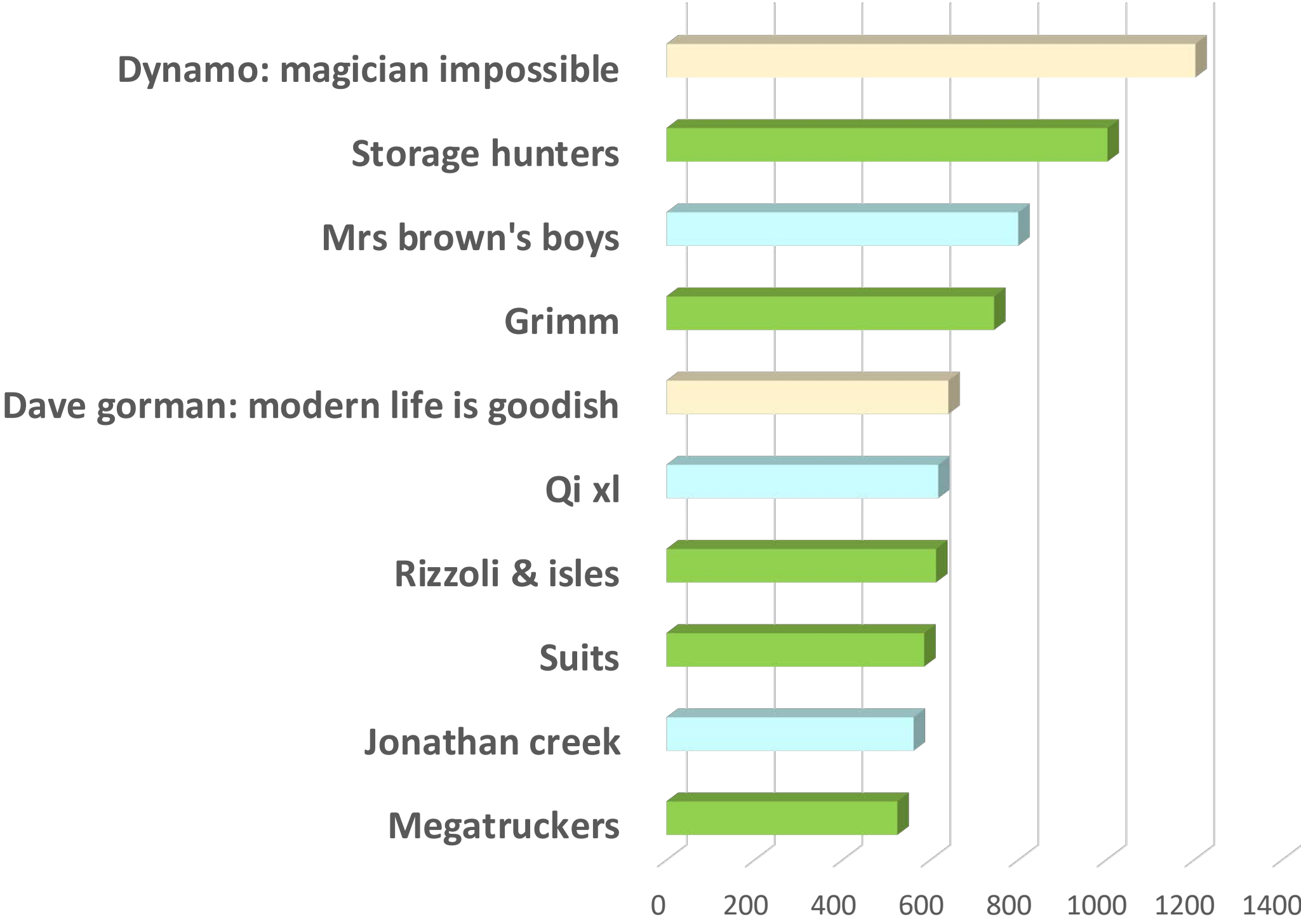
We have doubled our investment in UKTV Originals, to great effect



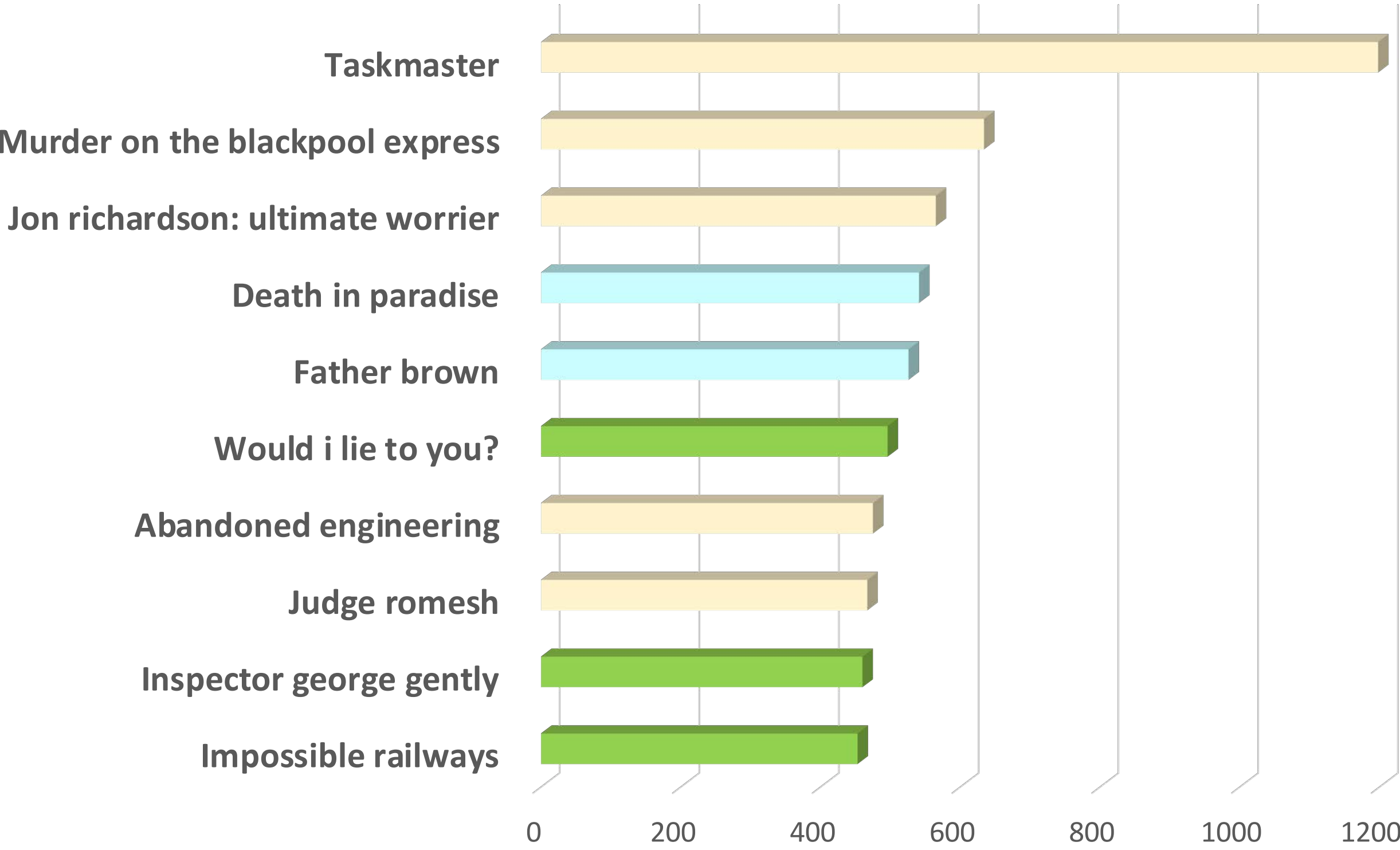


Original commissions are now a key differentiator & driver of performance

Top Ten Shows 2013 ('000s)



Top Ten Shows 2018 ('000s)



Source: barb/TechEdge full year 2016. Top episode. 000s



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Judge Romesh VOD preview - Project Dovetail results



Ep3 consolidated
399k



Ep3 Dovetail
491k +23%

Taskmaster Series 7 in detail

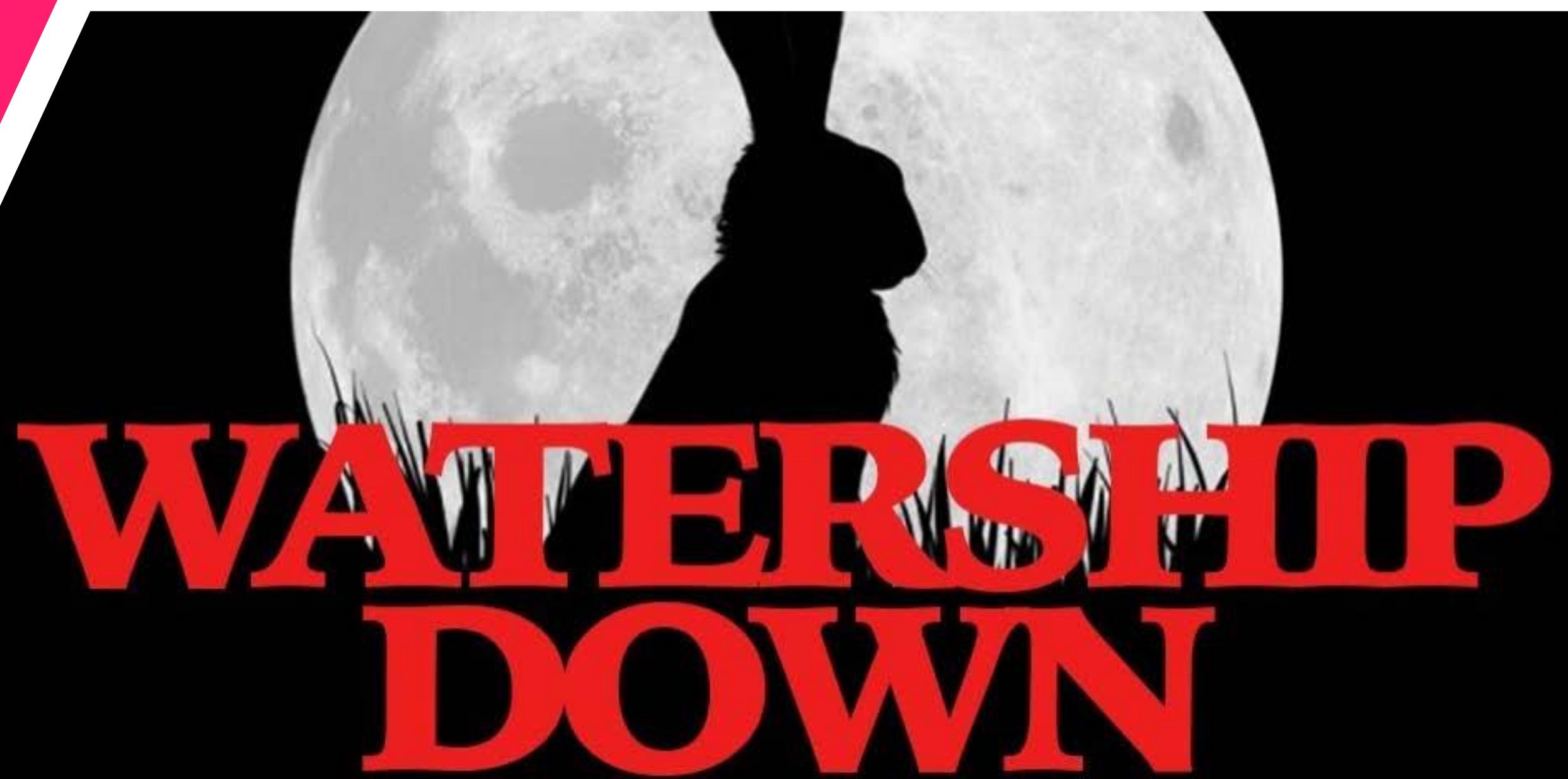


Episode	Preview	Live+VOSDAL	Time-Shift	Online VOD	8-28 Days	Dovetail
Ep1	0	679k	453k	36k	102k	1.23m
Ep2	356k	466k	406k	17k	138k	1.34m
						+9%



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All Episodes 18 January






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my5.tv

How Ring Solar P... Best ads in 5... gohenry | Th... Binet and Fie... UKTV Play Inbox (1,272)... Pages - Home We supercha... Thinkbox res... The Michael... My5 - Bla

my5 BROWSE SEARCH SIGNIN Register



BLAZE



Air Crash Special Ancient Aliens Forged In Fire Highway Thru Hell I Didn't Do It Ice Road Truckers

SORT

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PBS AMERICA











The Fight The Assassination of Abraham Lincoln Freedom Summer Trump's Takeover The White House Henry Ford

SORT

channel4.com

g Solar P... Best ads in 5... gohenry | Th... Binet and Fie... UKTV Play Inbox (1,272)... Pages - Home We supercha... Thinkbox res... Porter






Home Sign in to My4 Watch Live Categories Box Sets Catch Up Parental Controls: Off Search

VICE

Ground-breaking docs and award-winning series

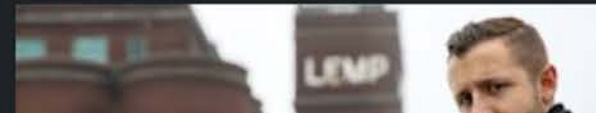



Hamilton's Pharmacopeia

Exploring some of the world's most unique drugs



HAMILTON'S PHARMACOPEIA
VICE

Latest Releases



See all (1



Product / UI has proved just as critical as content

- Enhances experience, differentiates, & drives performance

BEFORE



AFTER





VOD 2.0 for UKTV Play

- Mandatory registration (a double edge sword)
- Genre led vs Channel Brand led
- Recommendation engine
- Personalised UI
- Simulcast



VOD 2.0 Benefits



Data & Insight

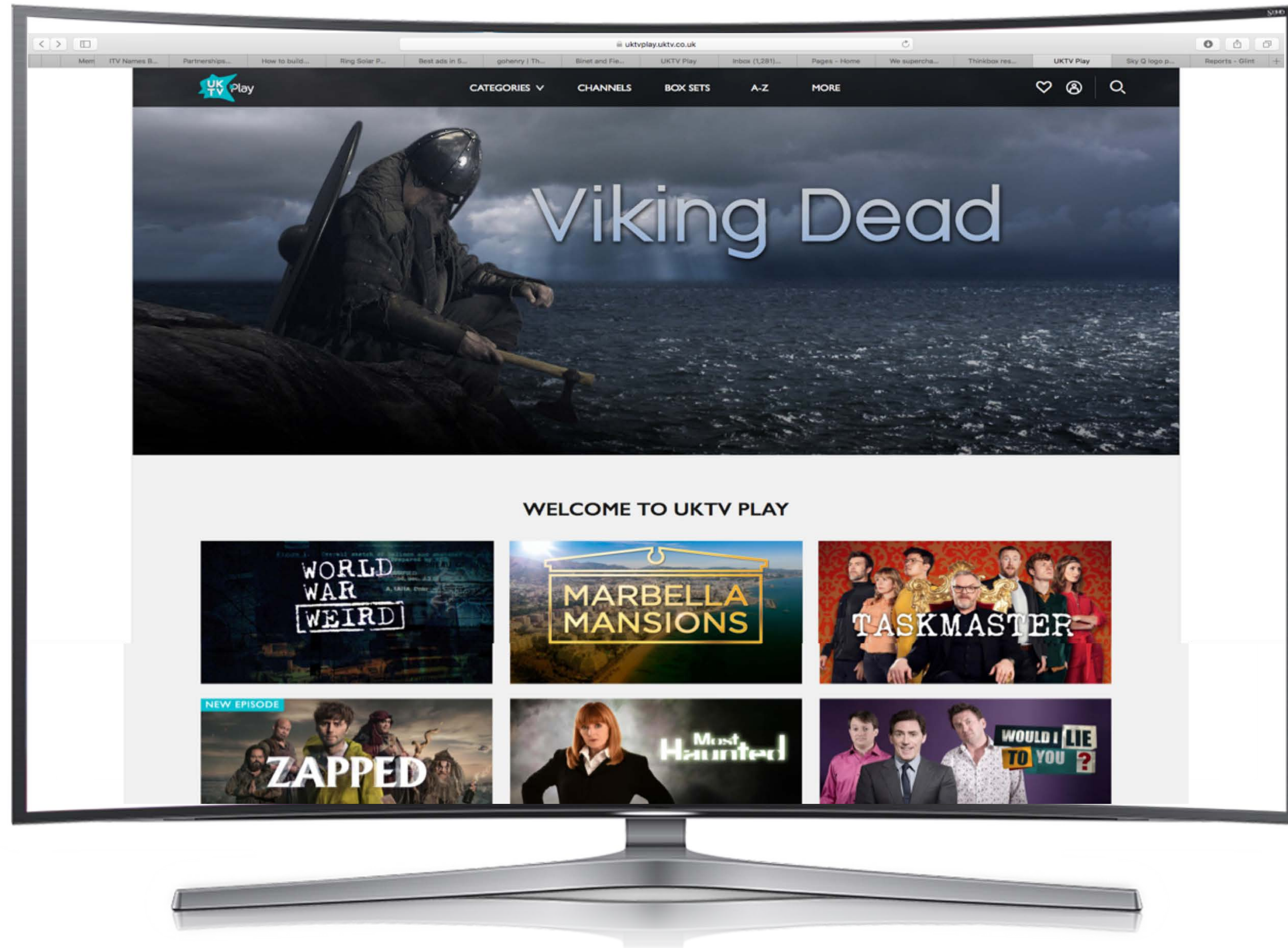


Customer Experience

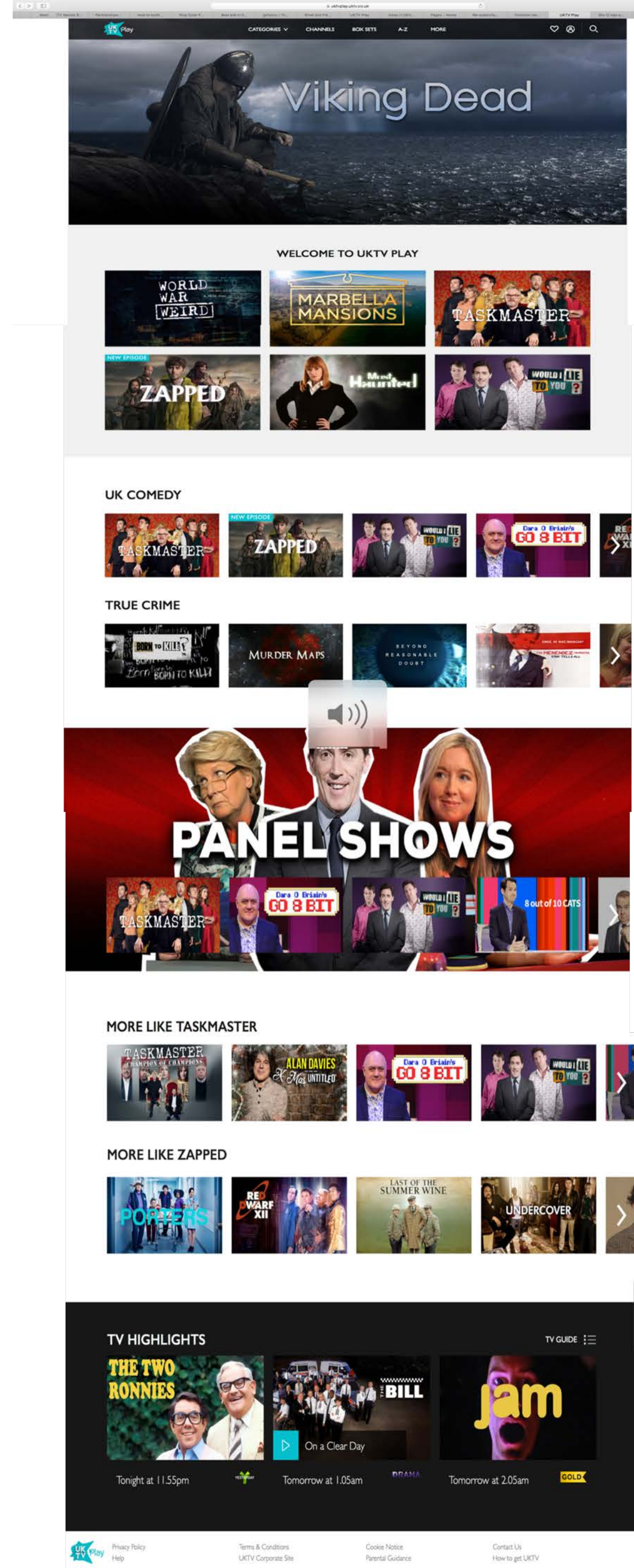


Increased Views
& Dynamic Advertising

VOD 2.0 – UKTV Play Before



UKTV Play VOD 2.0 - BEFORE



Hero Promo



Suggestions



Genre Recommendations



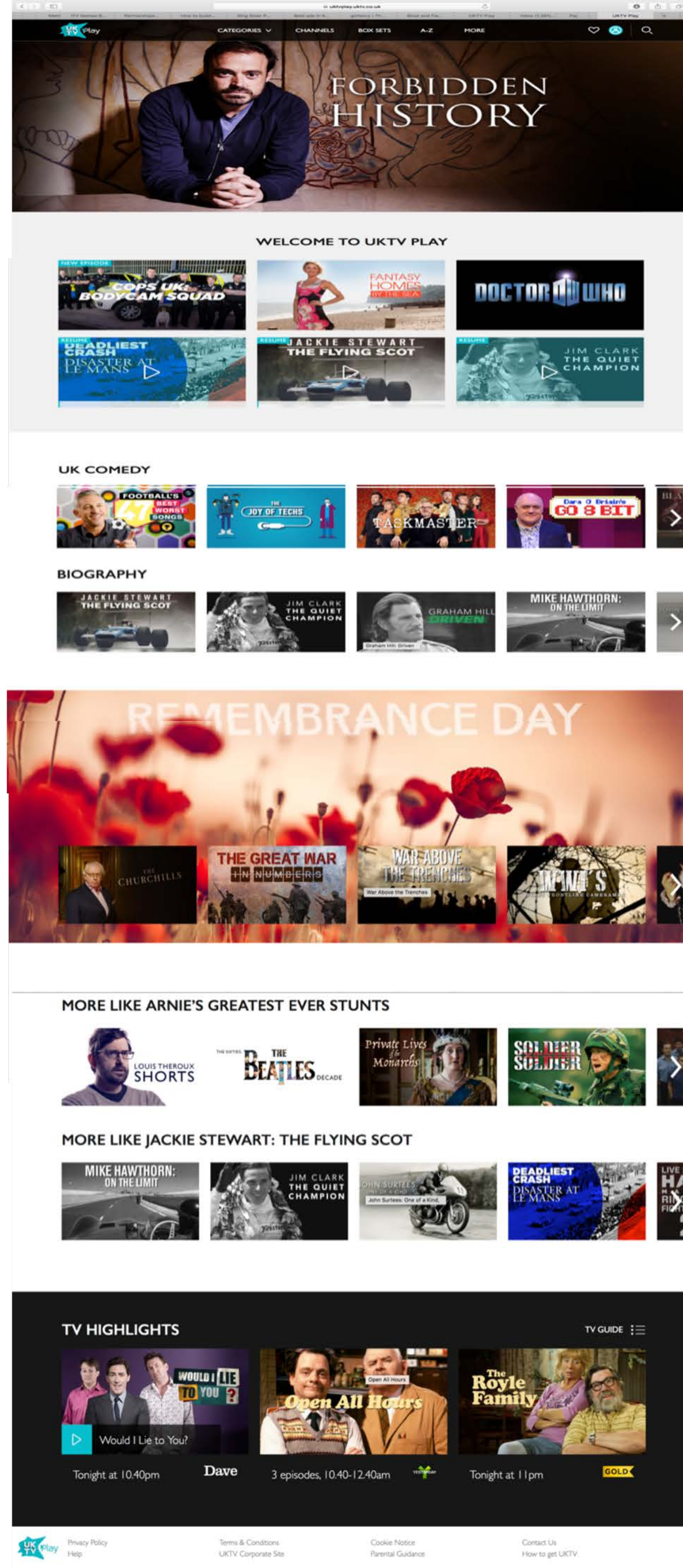
Secondary Promo



‘More like this’



Channel highlights



← ★ Hero Promo

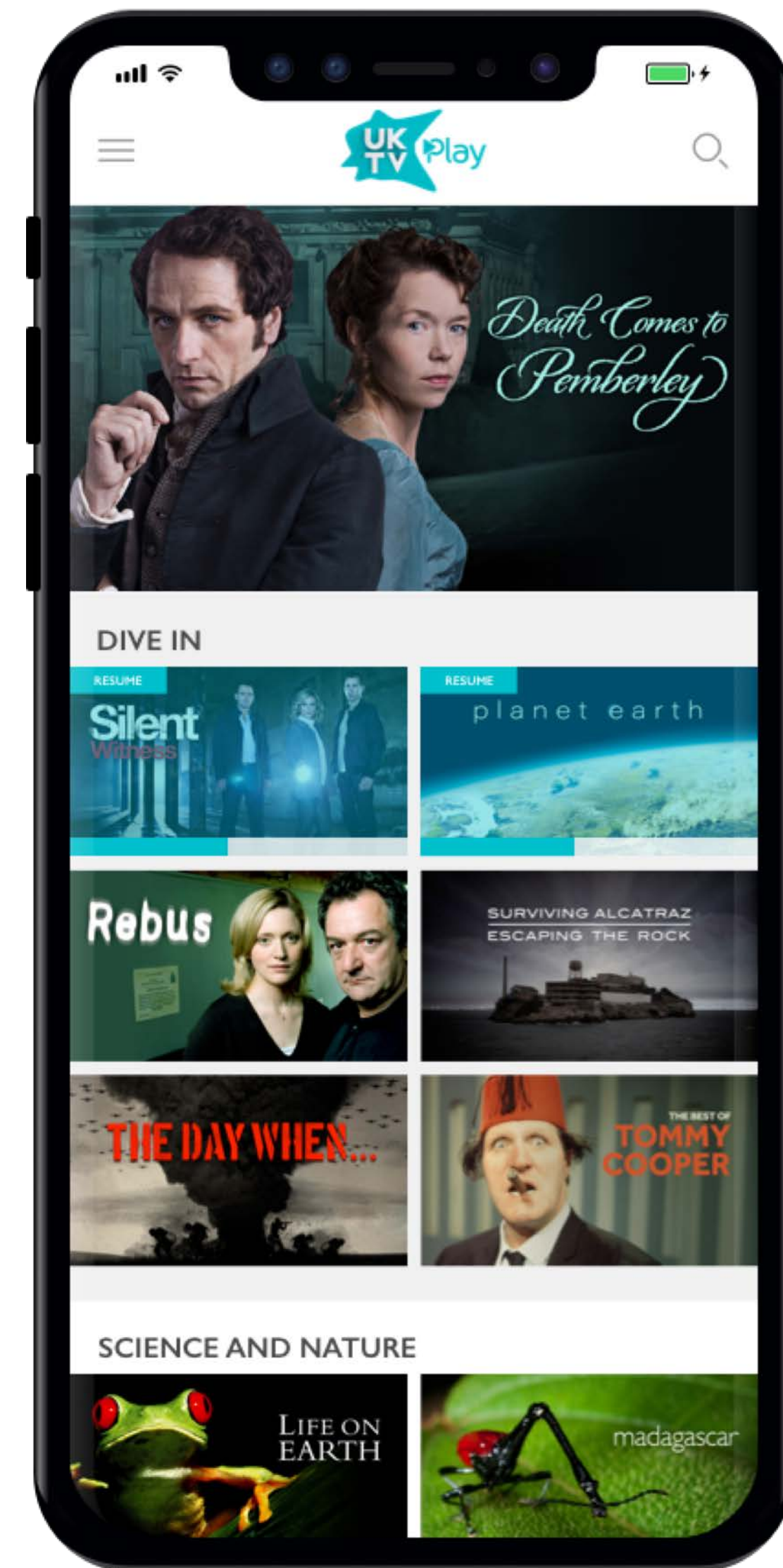
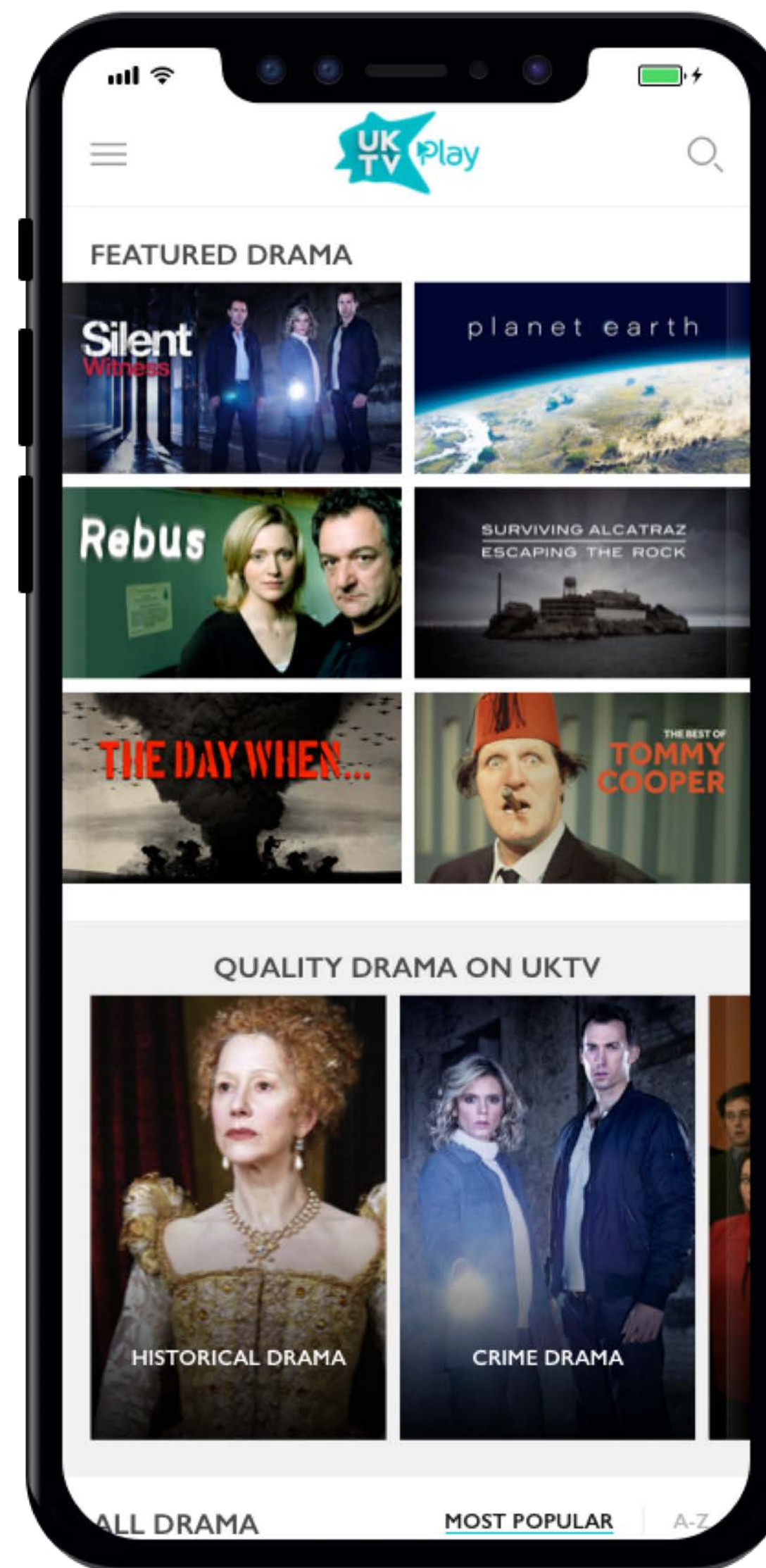
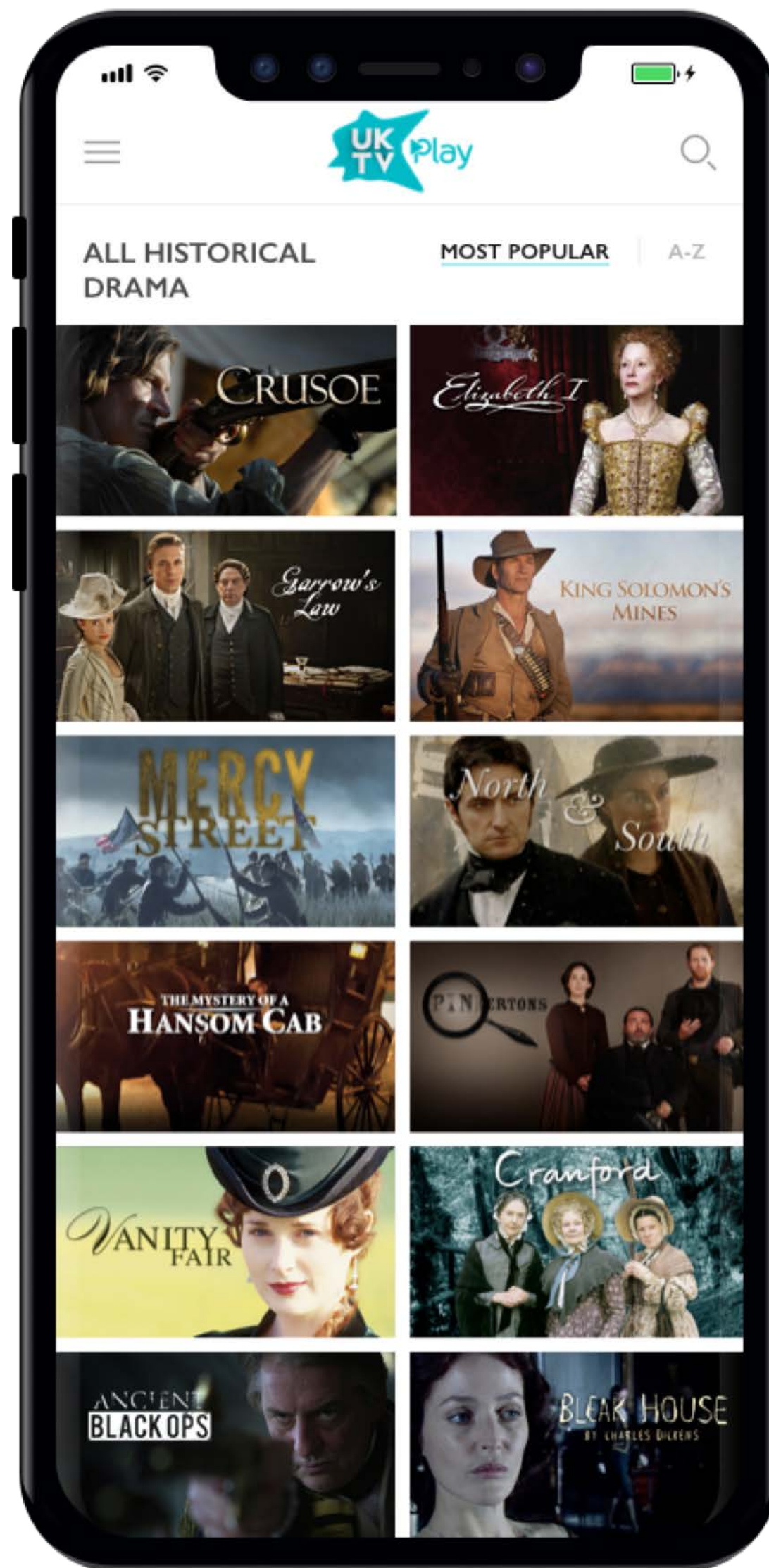
← Suggestions

← ★ Genre Recommendations

← ★ Secondary Promo

← ★ 'More like this'

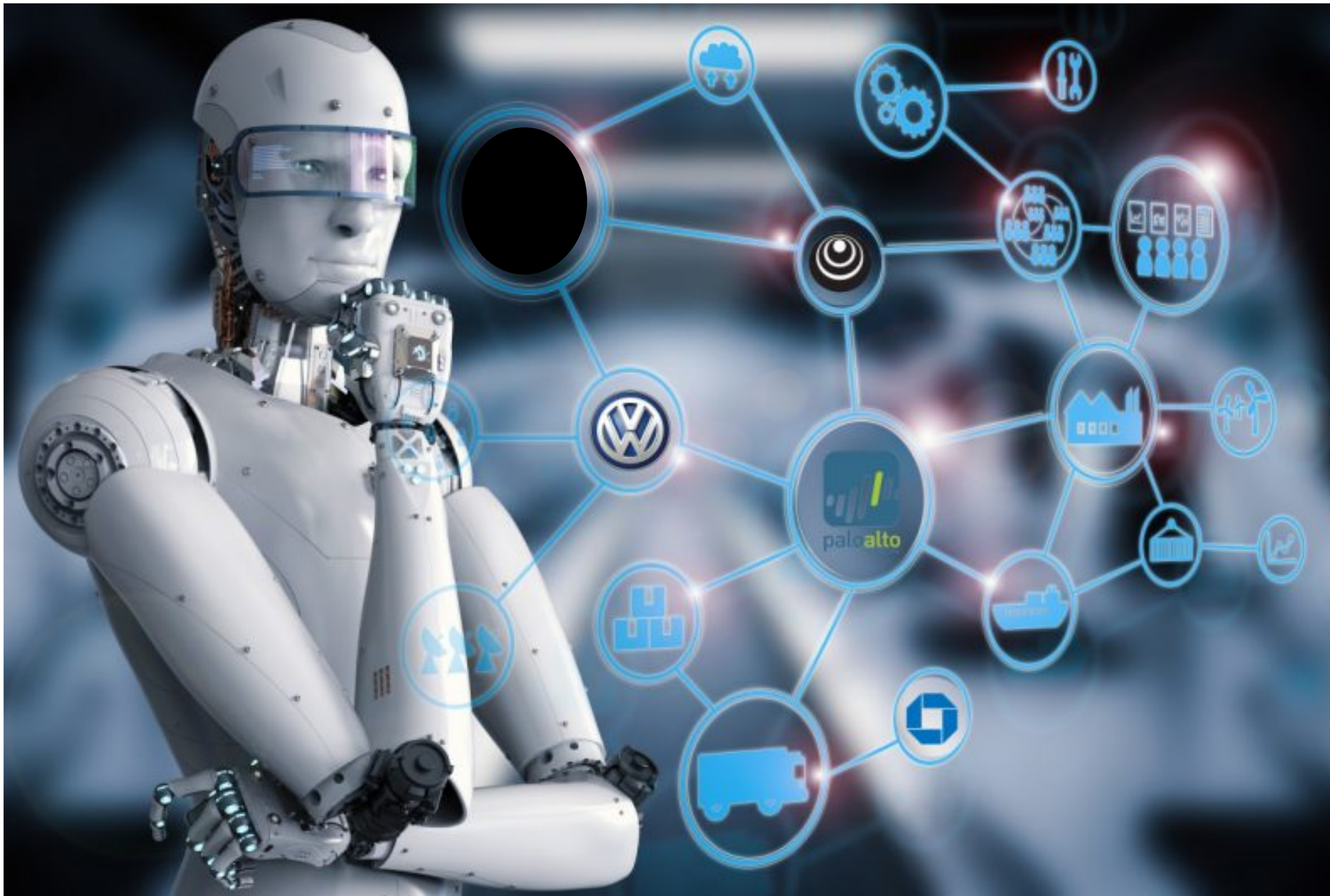
← ★ Channel highlights



UKTV Play 2.0 on Mobile



Where to next? – VOD 3.0



Personalisation:
Deeper & more sophisticated



Glass Slate App':
Integration of the linear experience



Dave



GOLD



REALLY

