

The UK will switch over to a fully-digital TV service in the next few years, prompting unprecedented opportunity for households to acquire PVRs. *David Fletcher* outlines the findings of a research project to find out how the device is likely to be used.

Lethal weapon

MediaLab commissioned Basis Research to construct a qualitative panel of 'early majority' households: households who hadn't thought about getting a Personal Video Recorder (PVR) but didn't completely dismiss the notion either. They covered a spectrum of viewing types: five-channel terrestrial, Freeview, established Sky households and more recent Sky converts.

A sample of 20 households had PVR equipment placed with them – effectively upgrading their TV experience with either Sky+ (in Sky households) or with *Which?* magazine's preferred Digifusion PVR for Freeview and previously five-channel only households.

These households were interviewed after two to three weeks with the equipment and then again after a further six weeks in order to get an understanding of initial and 'settle-down' behaviour.

Finding 1: Not all viewers are the same

When looked at through the prism of PVR acquisition it is clear that households differ – not only in their viewing behaviour, but in their attitudes towards TV.

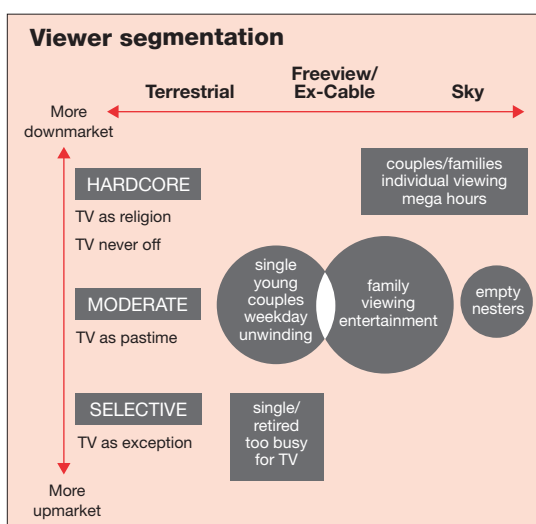
Three types of viewers emerged:

- **Hardcore** viewers, for whom the TV is central to household life and for whom PVR acquisition was a godsend.
- **Moderate** households, whose TV behaviour changed with PVR acquisition but to a lesser degree than the hardcore.

- **Selective**, who are light TV viewers whose viewing behaviour changed little or not at all.

Hardcores were completely in love with their TV – these were all Sky Digital users and immersed in the multi-channel experience.

The Moderates and Selectives were ambivalent about TV and less familiar with multi-channel as they were more likely to be terrestrial or Freeview users.



Source: MEC Medialab/Basis Research

Finding 2: Three steps to PVR heaven

Once acquired by a household, the speed and depth of PVR function adoption are driven by three factors, each of which relates in some



way to the Selective, Moderate and Hardcore segmentation of TV household types.

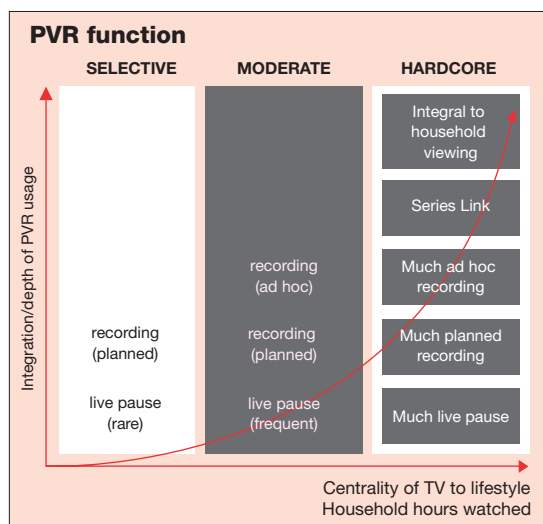
1. PVR awareness. The greater the understanding the greater the impetus: Sky's seamless and apparently ceaseless marketing of Sky+ as an extension of the existing service gives Sky households a much more informed start-point.

2. Interface experience. Again Sky has a head start as the Sky+ handset, functionality and on-screen interface are natural extensions of a (familiar) Sky experience. By comparison the Freeview model we tested was less intuitive and less integrated into normal viewing – presenting a relative barrier.

3. PVR champion. Someone in the household needs to lead the way, although there are three different types of champion:

- Technophiles – those impressed by gadgets with an inbuilt desire to use a new toy – almost for the sake of it.
- TV obsessives – clearly centred within hardcore households, motivated to enhance their viewing experience.
- Household managers – in particular mums, who found PVRs very effective in settling sibling disputes over remote control ownership – and also found new opportunities for viewing their own programmes away from or despite domestic interruption.

In the absence of any such champion – such as in pre-family or empty nest Selective households – PVR adoption was much slower and less deep.



Source: MEC Medialab/Basis Research

So in Selective households, the PVR eventually replaced the VHS with a little more recording than before, but not much else.

Moderate households were recording more

both on a planned and ad-hoc basis as well as making frequent use of the live pause function. Hardcore households were going the whole nine yards, with TV viewing now planned around the PVR and more viewing recorded than watched live.

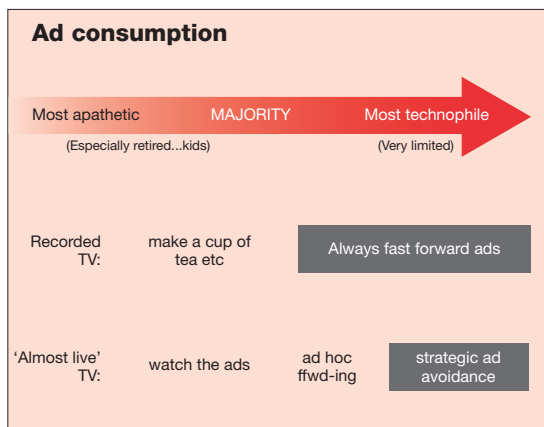
The change in recording behaviour – driven particularly by the relative ease – is responsible for driving increased channel repertoires, with viewers across all household types recording more on a speculative basis. Indeed, in some households this extended to a 'contingency TV' mode in which an 'OK' live programme was set to record whilst the viewers surfed around to see if there was 'anything better' on – knowing that they could return to where they left off if there wasn't.

Finding 3: Ad break 'chicken' and game-show bluff

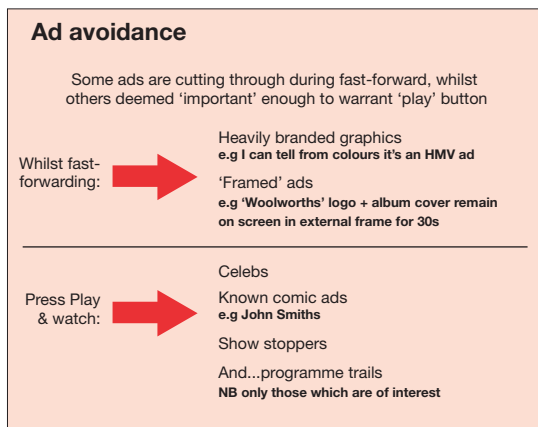
All of the sample households fast-forwarded ads during recorded programming. In general, our more Selective (Freeview) viewers tended to be less motivated to skip ads – ambivalent as much about what to watch as what not to watch. Hardcore households were using PVRs to cram the most programming as possible into finite time availability – and so were most motivated to avoid ad breaks. (As a consequence, it is possible that in time we will see heavier viewers' ad viewing decline faster than light viewers, so that advertising schedules might become easier to balance between heavier and lighter viewers.)

At the extremes, new behaviours are emerging – such as where ad break skipping is a competitive sport within households: who can skip the most of the break at 30-times speed but without over-running the fast-forward into the next part of the programme. Similarly, game shows such as *Who Wants to Be a Millionaire?* offer extra enjoyment if paused to allow family members to answer before the contestant.

Watching 'almost live' (ie after a temporary pause) is a slightly disorientating space for people – a sort of TV hinterland. In particular viewers tend to continue to watch ad breaks 'as live' – at least until a 'bad ad' reminds them of the opportunity to skip through and catch up. Almost no-one is deliberately sabotaging ad breaks by delaying watching a programme live in order to catch up with 'real time' through surgical removal of the ad breaks. Even where the minority are doing this it is not motivated negatively – rather it is from the desire to 'squeeze 90 minutes of soaps into 65 minutes'.



Source: MEC Medialab/Basis Research



Source: MEC Medialab/Basis Research

Navigation through the ad break is made easy for viewers by the prevalence of programme trailers and sponsorship idents. Sponsorship credits provide a natural reason to stop whilst programme trailers (typically after the last ad in the break but before the sponsor credit) provide a genuine viewer service— especially as the link from trailer to setting the PVR to record the programme is now relatively trivial.

It is still possible for ads to cut through, however, whilst some merit sufficient

'importance' to warrant the 'Play' button. The same applies to programme trails where a particular actor, for example, would prompt full viewing of the trail. In both cases this argues for greater use of 'press red' interactivity to make the most of every opportunity with viewers who have effectively opted-in to a message. ■

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Where Next For PVRs?

Atticus Abstract

Branding blues

Six Deadly Traps for Global Branding and Advertising
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The author begins by outlining the problem. Global approaches to branding have gone through three distinct phases, he says. In the first, multinationals were content to conquer the world, allowing quite different versions of their products to flourish in different places. In the 1990s the doctrine of globalisation and global brands became universally adopted, driven by the move to put brands

on the balance sheet. Now we're in the era of 'glocalisation' – finding the right balance of global consistency and local adaptation.

The problem, says Hamsini Shivakumar, is that "this vision of a middle path is simply proving a mirage for many companies." Shivakumar's thesis is that the barriers to the middle path are internal ones, involving culture, processes and tools, analogous to the obstacles that derails so many mergers. So on to the "six deadly traps", from each of which there is fortunately a means of escape. Trap one is about not understanding whether your objectives are to deliver growth or cost reduction (or both).

The answer, says Shivakumar, is that you should always focus on growth. Trap two, 'the alignment trap', is where cross-

cultural teamworking turns into power politics, with meetings designed to create alignment becoming turf wars over whose strategy is adopted. Investing in the development and leadership to create a culture of teamwork and trust is the only solution in this case, says Shivakumar.

The remaining traps are summarised as follows: global and local teams being rewarded on different criteria; local feedback that is ignored as it doesn't conveniently fit the model; a cumbersome trial-and-error approach to testing new markets; and the desire to constantly reinvent the wheel with each change of brand management. The conclusion? "Unless teams find ways to address all six deadly traps, they are likely to stay lost in the middle, facing the mirage of global branding." ■

