

Futures Research

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“All The World’s A Television”

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All The World's A Television

*All the world's a stage,
And all the men and women merely players:
They have their exits and their entrances;
And one man in his time plays many parts*

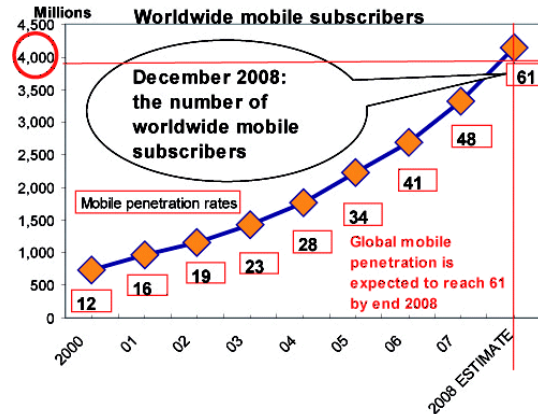
- Shakespeare's *As You Like It*

In 1600 Shakespeare said all the world's a stage but by 2020 all the world will be a Television set. Shakespeare meant that our lives unfold like a play on a stage. What he didn't foresee is that with the right technology that stage can be viewed by anyone, anywhere, anytime – and that time is fast approaching. Social, technological and economic forces are merging in such a way that a dozen years from now we will likely live in a world of ubiquitous video imagery. This evolution from *The Globe* theatre to theatre anywhere on the globe will dramatically change the viewers, creators and distributors of TV content.

Specifically, there are three forces at work creating five major changes. The forces are :

Ubiquity of signals. A major force in our information age is the trend towards increased bandwidth and signal capacity being made available in more and more parts of the world. Ironically for the television industry, it is the computer and mobile telephone industries that are driving this push for signal ubiquity. As these devices rely on greater bandwidth available in more places, it creates political pressure and economic incentive to build out a robust signal infrastructure.

Ubiquity of reception devices. The International Telecommunications Union projected that worldwide mobile cellular subscribers are likely to reach the 4 billion mark before the end of 2008 (ITU press release 09/25/2008 http://www.itu.int/newsroom/press_releases/2008/29.html). In eight short years we have gone from just 12% of the population having a mobile phone subscription to 61% (see chart on next page).



Source: ITU World Telecommunication/ICT Indicators (WTI) database.

Currently the majority of these “reception” devices are for receiving sound, text and information on a small screen, but each generation of phone moves in the direction of providing a better visual picture. In many parts of the world, the computer is being bypassed for the mobile phone, making the screen an integral part of the device.

While mobile phones with video capability are being placed in the hands of individuals, flat screen TVs and other devices for projecting TV are becoming standard items in many public spaces. They are showing up in restaurants, bars, gyms, waiting rooms, stores, lobbies, airports, elevators, check-out counters and cars. Background music is being replaced with background video.

Ubiquity of control. There was a time when a few broadcast companies controlled what you could see on TV and when you could see it. The “where” was determined by the placement of a large, heavy vacuum tube television set. Now we see that control is moving closer and closer to the consumer. Digital Video Recorders let you watch shows on your own time. The computer makes programs available without even recording them. When it comes to controlling content, we see a huge change. Shakespeare was right that all the men and women are merely players on the stage, but now their performance can be uploaded and viewed by the world through YouTube, Myspace, Facebook and others. The decreasing cost of creating video content and the ability to digitize, store and distribute video means that we never run out of content. It means that old video content can live forever, and anyone with a cheap video camera (or phone with that capability) can add to the library of images.

What It All Means For The Future

Taken together, the ubiquity of signals, devices and control are shaping a future where video programs and images are becoming an individualized part of the ecosystem that humans live in, rather than a separate experience orchestrated and controlled by others.

Specifically, here are five major changes that will likely come about by 2020 when it comes to television.

Social Change:

Time to wait will become “time to watch.” People will be able to “snack” on video content the way they do with audio content using their iPods. We will see more people creating a personal space for viewing TV out of a public space.

Economic Change:

Advertising will be location specific. As more devices have GPS built into them, the ads people see will reflect their location. It won't be a generic ad for Domino's pizza they see, it will be for the Domino's around the corner from where they are watching.

Technological Change:

We'll all have a studio in our pocket. By 2020, the typical mobile phone will have the storage, capabilities and power to create, display and distribute video content on an extremely professional level.

Political Change :

The bully pulpit will become the bully broadcast. As this last election showed - with Obama's 30 minute paid campaign ad drawing over 30 million viewers – video will be instrumental in connecting with the public.

Society gets naked! As mobile phones become mobile news studios (as mentioned above) society will become much more transparent, with news leaks becoming nearly instantaneous and potentially global.

What This Future Will Feel Like

The ubiquity of television will add another layer of temptation when it comes to our down time in public spaces. Currently people can pull out a book, play on their phone, plug in their iPod, just stare off into space contemplating the universe, observe the flow of life or – heaven forbid – strike up a conversation. That's a lot of choices, but imagine if you could also sneak in the opening monologue from Jay Leno, the headlines from CNN or the highlights of last night's football game from ESPN in super-fast crystal clear video? What would you do? Like a dieter surrounded by cupcakes, it is hard to see how people will resist the temptation of watching a show over the work of creating a conversation. As with every new technology we will likely go overboard at first and then find a reasonable adjustment of social norms.

The TV viewer of the future will feel much like the internet surfer of today – overwhelmed by choice. It has been said that once something is on-line it never dies, from false rumors to pictures of bad hair days. That same concept will apply to video material. Nearly everything will be accessible. Want to see the first episode of *Gilligan's Island*? It will be there. The *Nixon/Frost* interviews from decades ago? No problem. Last night's *Daily Show*? Of course. We are already close to this level of access right now, but it still is dependent on being at your home TV set or on your laptop and in range of a fat signal. What will make the future different is that you will have this power wherever you go, and will likely develop habits that have you tapping into this power more often. The first cell phones were used sparingly as one strained to get a connection. Now people walk around with bluetooth earpieces having conversations even as they enter the restroom! It is this evolution of ubiquity that we will be facing for TV.

If ubiquity of television follows the path of today's cell phone, then the content of TV is likely to evolve like today's book industry – a few blockbuster titles that many consume at roughly the same time with the bulk of consumption across many different titles suiting the individual tastes of a diverse group. Adding to the ponopoly of content will be all the material that amateurs, hobbyists and semi-professionals will make. Think YouTube but with digital quality video, better editing and even special effects.

In 2020, turning on the TV to see what's on will be more like walking into the library of congress and asking what's good to read. Those who can help answer that question will be the new power in television. It could be smartmobs that direct you to find new shows you will like, or cultural experts who's opinion you value. The traditional gatekeepers – the broadcast and cable networks – will still have the power to finance and make some shows over others, but they will lose their power to tell you when to tune in.

For some, this abundance of choice will turn television into another media commodity. New media – particularly realistic virtual worlds – will become to generation Z (those currently age 1-14) what Television was to Baby Boomers. Teens will tease their old school parents for still watching pre-made, non-interactive, linear television shows when they could be immersing themselves in highly realistic, complex worlds where the participants have the power to build, create and interact.

Opportunities and Threats For Broadcasters

For television broadcasters (ABC, CBS, NBC, FOX, CW) this new world will threaten their current business model which is based on mass audiences tuning in at specific times to watch shows and the embedded commercials. The biggest threat is that so many people will be syphoned off that the viewing audience will be too small to support the financing of the shows. A secondary concern is that even if they watch the programs later on, the viewing will not be counted. Advertisers who want to get their message out at a specific

time will not pay for viewing that takes place after a weekend sale has occurred, a movie has opened, or a new phone has been released.

The opportunity for broadcasters will be as the place to watch live television – breaking news, opening concerts, sporting events. It could even cause scripted shows to become live in order to capture viewership.

Broadcasters could change their business model to sell ads for the lifetime of that content inside programs that target the overall brand imagery of the advertising client rather than a specific product. Coke, Toyota, Colgate, Tide or any number of big brands could purchase ads that stay with the content no matter where, when or how often they are viewed.

Another opportunity would be for broadcasters to act as TV DJs – putting together new and interesting mixes of programming in much the way radio DJs create unique playlists of songs. These programs could mix classics with new releases to create viewing events. Their power would be as experts in what is out there to bring people what is good.

Conclusion

The ubiquity of signals, devices and control over TV will reshape the landscape of this industry. A dozen years from now we'll find video content seeping into the small cracks of space and time that up to now have been immune from this media – for good and for bad. Like books, phones and radio, the television of the future will resemble a media commodity that offers consumers nearly unlimited choice and control. The old TV business model of selling time-sensitive advertising space will be threatened, but new ways of making shows – and making money – will emerge to take its place. In entrepreneurial America, if all the world is a stage then it can also be a billboard.