



platform status report
**AN INTERACTIVE TELEVISION
ADVERTISING OVERVIEW**

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Introduction

Over the past year Interactive Television (iTV) experienced significant strides. With 75% of US TV households now exposed to some type of iTV advertising—**over 200 million consumers can now use their TV remote control to engage in a two-way dialogue with brands.** Increased opportunities for rich and immersive iTV are present through telescoping and integration of co-browsing companion devices such as smartphones and tablets. During 2011, iTV campaign airings numbered in the thousands with response and interaction rates that rival – and on certain dimensions even exceeds – internet advertising. For the major advertisers already utilizing the space, iTV advertising is effectively transforming TV into a vehicle of both mass awareness and mass engagement. Interactive TV enables a total strategy that delivers consumer-initiated engagements, promotes cross-channel convergence, and drives superior return on investment.

Because iTV has reached a point where heightened technological development, marketer interest and consumer adoption are converging, the Interactive Advertising Bureau (IAB) considers the details of common iTV capabilities, players and nomenclature to be of the utmost importance. This major revision to the initial iTV Industry Overview, published in 2010, has been produced in order to:

- Educate interested individuals and enthusiasts on iTV's definition and value
- Expose and highlight recent industry developments
- Give thoughtful consideration to industry challenges and initiatives chartered to propel iTV forward to an increased level of usage and adoption

Interactive TV (iTV) Defined

The IAB Interactive TV Committee defines iTV as a participatory television viewing experience that allows a user to send or request information back to the programmer or advertiser. Applications are created that allow users to navigate the experience and select options using the existing remote control or modified ancillary screens (i.e. smartphones or tablets). Just one of many iTV examples involves a viewer who is watching a commercial advertising a new scent for a national laundry detergent brand. During that commercial, a prompt presents itself asking and instructing, "Would you like to experience the freshness of our new scented detergent? Click yes to receive a free sample." The viewer then uses the remote control to select yes, and approves sharing the mailing address associated with the television service. Shortly afterwards the sample arrives in the household's mailbox creating a high potential for a new customer. A description of all types of advertising-oriented iTV applications and experiences can be found in this report's Capabilities section.

ITV comes in many varieties, depending on the capabilities of the service provider and the creative direction of the marketer. Ranging from basic polls and surveys to multi-platform telescoping and social media integration, iTV incorporates multiple advanced consumer technologies. Regardless of the specific iTV implementation chosen, the core tenet of iTV's value is engagement, or the utility transferred to the brand just by giving the user the opportunity to interact. Fulfillment of free samples or coupons is noted as best practice for lift, but is not necessarily essential for creating an engaging interactive experience. ITV polls and surveys and long form VOD Telescoping are very popular ways of boosting brand recall and purchase intent by allowing viewers to submit opinions on various aspects of brands' product lines. In this case, the traditional television advertising experience has just advanced from one-way to two-way communication.

Instances of interactivity are by no means limited to advertisements; iTV can also be found in programming, where viewers are polled about story lines or given options to interact with richer, more customized supplemental content. Programming interactivity presents the opportunity for advertiser brand sponsorship and logo placement, creating additional impressions and increasing recall.

History and Evolution

The first systematic test of interactive television began in December 1977 when Warner Cable pioneered a two-way interactive cable system called QUBE. QUBE allowed for voting and polling during interactive programming such as soap operas and news shows. The system can even be credited as the grandfather of interactive talent shows such as FOX's American Idol, as it featured a program, Talent Search, which allowed viewers to vote for winners using the remote control. After proof of concept was achieved in the test market and moderate investment towards nationalization occurred, QUBE was dismantled due to other prevailing corporate interests, growing debt, and growing privacy concerns.



Pictured to the left is an actual QUBE TV remote control of the 1970's. The remote allowed for viewers to participate in programming surveys and polls by selecting one of five choices (buttons labeled 1-5 on the right) and aggregated responses in just 6 seconds. The QUBE remote

In the intervening years, numerous concepts and services creating robust interactive programming and advertising applications have come and gone. These included Time Warner's Full Service Network in the early '90s, WebTV, and AOLTV, in the late '90s - all of which faced both bandwidth and infrastructure limitations.

The Current State of iTV

At present technological developments, advertiser interest and consumer willingness have all converged to rejuvenate iTV. After decades of trials, iTV is in primetime within the U.S. marketplace. Thirty years after the Columbus, Ohio launch of QUBE, there are numerous reasons iTV has emerged as a common feature of the television advertising experience:

- **Technology is in place and the industry is motivated.** Satellite, Cable and Telco TV have readied their systems, adopting new industry standards and expanding their interactive services. Developers and engineers are finally overcoming the technological challenges that have riddled the industry's growth for decades and have found relief through slightly increased bandwidth, advanced video distribution over IP-backbones and the development of cross-generational set top box-compatible applications such as Enhanced TV Binary Interchange Format (EBIF).
- **Consumer expectations are forming.** DVRs, Program Guides, VOD and Gaming Consoles have trained viewers to enjoy interacting with TVs, while mobile apps have made consumers comfortable with the concept of engaging with internet content on different screens. Further propelling iTV advertising is the gradual, yet fundamental shift in viewing behavior.

- **Competition is real.** In an age where DVR, live pause buffer and Over the Top (OTT) video consumption are creating ad-less viewing experiences, satellite and connected TV's offer interactive features and widgets/applications, and consumers are increasingly watching TV on non-TV devices, advertising is shifting online.
- **The industry is motivated.** Americans are watching more TV than ever, alternate device and consumption methods are emerging and video providers across all segments are heavily investing to maintain the large TV screen's share of marketing dollars. Telcos have continued scale of national fiber-based video distribution networks to complement their traditional voice and internet services. Built on two-way communication models, interactivity is a foundation of the Telco video experience. Set top MSOs have committed extensive resources to Canoe Ventures to develop and deliver a single national solution that enables interactive, addressable advertising to TV at scale. They have equally invested in their own local advertising interactivity capabilities. Satellite providers also value the engagement that interactivity brings advertisers, and have deployed award-winning creative campaigns with results that have consumers clicking and agencies paying close attention to interactivity.

All of these trends and developments have increased interest and instances of interactivity. In September of 2011, for example, Comcast Spotlight announced that over the past year it had run more than 1000 iTV campaigns resulting in 2.5B impressions.

Why Spend in Interactive Television?

iTV represents an excellent medium for advertisers who want higher levels of consumer engagement through innovative marketing applications. Through multiple studies, iTV has proven to increase unaided brand recall and purchase intent, and ultimately create sales lift. The latest of such studies released in 2011, "CEE MEE," conducted by Canoe Ventures and the 4A's studied how the Connection, Emotion and Experience of advanced television solutions, including iTV, relate to the Measurement, Efficiency and Engagement advertisers seek. CEE MEE's findings regarding test brands and iTV include:

- Unaided brand recall for the test brand was 126% higher following an exposure to an interactive offer, regardless of whether the viewer actually accepted the offer.
- Likelihood to purchase the test brand was 29% higher for all exposed to an interactive offer.
- Likelihood to seek more information about the brand was also 29% higher following exposure to an interactive offer.

Other industry players are seeing similar and even better results on brand metrics as a result of iTV campaigns. For instance, according to Ipsos research, BrightLine has observed a 200% lift because of iTV exposure in purchase intent on average.

- **Metrics/Accountability**

Today, nearly 40% of TV households have DVRs, decreasing the value of traditional commercial buys. As of second quarter 2011, TiVo and Stop Watch reported that nearly 66% of broadcast network primetime TV is viewed in time-shifted mode, up significantly from reports in 2009. While 99% of video consumption still occurs on TV, the 5 hours per day spent watching is now characterized by clicking, recording, on-demanding, and fast-forwarding. As the proliferation of DVRs increases, the measurement models for traditional :30 second commercial buys become less reliable. At the same time, the online advertising measurement capabilities become more robust. The metrics that can be provided with many forms of iTV bridge the gap, making televised advertising accountable in a way that traditional :30s cannot. Measurement can include the exact number of people who interact as well as the length and depth of engagement.

- **Consumer Engagement and Relevance**

When choosing to engage with iTV the consumer indicates receptivity to receiving branded messaging and information. The consumer self-identifies as a highly receptive, target recipient of the branding message. The user experience evolves from a passive encounter to a lean forward, consumer-initiated dialogue. Once engaged, in many scenarios, the viewer can continue the engagement for as long as the interactive experience holds their interest. Interactivity relevantly heightens consumer engagement with traditional TV spot and programming, as well as serves as a platform for longer form engagement. Enabling a more customized consumer engagement compared to a traditional TV spot, iTV advertising has proven to be more impactful (lifting purchase, brand affinity, brand advocacy, etc.) than traditional passive exposures.

- **Less Cluttered Ad Environment**

Most iTV offerings provide a brand with the opportunity to create a rich, singular branded experience that allows for an immersive consumer experience. This is not an experience that can be replicated within a series of commercials in a traditional commercial pod, or in the visually cluttered environment found on many websites. Unlike online advertising, which serve multiple ads at once, iTV often offers a single branding message and environment at any given time.

Advertisers are taking advantage of these benefits at growing rates. And by 2015, Bank of America’s “New Life for Television” study projects that U.S. addressable, iTV advertising revenue will reach \$14 billion.

An End To End iTV Experience

In this Request For Information (RFI) detailed by Cablevision, users are first prompted with an overlay towards the bottom third of the screen to initiate the interactive experience. The commercial video is then squeezed back to a Picture-in-Picture (PIP) stream allowing the majority of the screen’s real estate to be used for interactivity descriptions and prompts. On this second screen, the viewer is asked to verify their permission to use their address on file to receive more information from the advertiser. The third screen gives a receipt expectation interval and asks for a final confirmation.



This is just one example of an interactive experience and there are many variations depending on platform capabilities and the advertiser’s creative direction.

• **Capabilities**

As technology and viewing behavior continue to change within the TV industry, marketers now have an array of interactive opportunities to choose from, ranging from simple overlays on top of commercials to complex applications that allow consumers to purchase products or engage with a branded message for an extended period of time. With iTV reach, functionality and content all continuing to grow, the opportunities—both near-term and long-term—for advertising and marketing on the iTV platform have never been brighter.

Regardless of form, all iTV ad solutions allow for a more immersive advertising experience than a traditional :15 or :30 advertisement. This is largely due to the willingness of the consumer to opt-in to the iTV experience as a member of a self-selected audience. This volunteerism coupled with richer and deeper brand content together give iTV what is referred to as its enhanced effect.

While there is not yet one standard Interactive Advertising unit or functionality, there are consistent advertising products that have been broadly deployed by service providers throughout the US. This section gives an overview of what is available today and from which providers. Ad units can be broken down into two elements: Entry Points and Destinations.

• **Entry Points**

Entry Points are branded touch points within the TV viewing environment where the viewer is first exposed to the interactive advertisement. In addition to serving as a ‘doorway’ into a more immersive ad experience, many of today’s iTV Entry Points also generate valuable brand impressions. Entry Points may be displayed within commercial or programmatic content based on some contextual or technical trigger, or may be displayed within the user interface screens or menus of the STB or other devices connected to the TV.

With guides and menus becoming more central to TV viewing behavior, Entry Points or placements within TV environments (i.e., channel guide, VOD/DVR menu, home portal, gaming showcases, etc.) are increasingly important. These types of placements not only enable marketers to reach viewers in all the new ways they are watching TV, but also serve as an important source of high-impact, DVR-proof TV ad impressions. Types of entry points are as follows:

Enhanced Commercial Spot

A commercial spot that has a banner overlay and/or custom, ‘baked in’ video element that invites viewers to click to or tune to an interactive ad extension or VOD environment. Enhanced commercials can leverage telescoping capabilities, quick-click RFI offerings, or customized calls to action. Enhanced commercials can be built from existing TV commercial content or new, custom assets.



Source: BrightLine, Cisco, Kellogg’s, DirecTV, DISH Network

Interactive Program Guide Banner

iTV advertising entry point placed on the bottom, left, or right side of the Interactive Program Guide (also called Electronic Program Guide) that can be used to direct viewers to other channels, VOD content, interactive ad destinations, or other areas of the user interface. These banners can be clickable and direct viewers with clear calls to action/channel number call outs.

Source: Comcast



Main Menu Placement

A video or non-video entry point that is displayed on the main menu of an interactive portal that may be 'clicked' to navigate elsewhere or launch a number of any interactive advertising features. Similar to a banner online, it entices the viewer to engage further with a brand. These entry points can take form as a banner, listing, or clickable video window.



Source: BrightLine, DirecTV, DISH Network, TiVo

Channel Guide Listing

A listing within the channel guide that invites viewers to tune to a dedicated brand channel.

Utilizes the channel description section in the guide to provide a quick summary of what the channel offers.



Source: BrightLine, DirecTV and Dish Network

Clickable Full-Screen Skin/ TV Roadblock

A full-screen skin of a themed channel mosaic or other interactive portal. Enables marketers to launch a “roadblock” on TV. Viewers may click on it to navigate elsewhere or launch a number of interactive advertising experiences

Source: BrightLine, DirecTV and Unilever



Showcase

A showcase grid featuring branded thumbnails or banner that have the ability to expand and/or port viewers to a variety of interactive destinations.

Source: BrightLine, TiVo and Unilver



Interactive Tags in Commercials

Meta-data embedded or encoded in a commercial with additional information or graphics. When the commercial runs, graphics are triggered to appear with a call to action or other interactivity. This may also be activated during “trick play” modes. These are also sometimes referred to as Billboards or Speed Bumps when they are displayed over commercial content in fast forward or rewind mode.



Source: BrightLine, TiVo, Cisco and Unilever

Pause/Delete Screen Banner

Entry Point placed within the DVR user interface in the Pause or Delete Menu that can be used to direct viewers to tune to other channels. Interactivity may be presented when selected and lead to an application, other section of User Interface, VOD channel, or branded showcase/microsite.

Source: TiVo



Static Blade on a Gaming Console

A static banner ad that is located within one of the sub-menus of a gaming console, which when clicked, brings the viewer to an interactive advertising destination.



Source: Xbox and PlayStation 3

Video Blade on a Gaming Console

A looping video ad that, when scrolled over, plays audio and, if clicked, brings viewers to an immersive ad destination. These blades are located within the gaming console's sub-menu.



Source: Xbox and PlayStation 3

Pre-, Mid-, and Post-Roll Advertisements

Interspersed before, during, and after video content on Video On Demand, these interstitial billboards invite viewers to explore another VOD folder where branded video content is housed.



Source: Food Network and Havoc VOD

• **Destinations**

Destinations, on the other hand, are the follow-on experiences presented once interactivity has been initiated through the entry point. Possible destinations include:

- An application that enables interactivity while retaining the video experience, through overlay or video scale/squeezeback
- A full-screen billboard or static page dedicated solely to the advertiser
- DALs (designated advertiser locations) or Microsites—mini-websites that can internally include multiple locations. In some systems the live stream is paused while the viewer engages with the Microsite; in others the content continues to advance while the viewer is engaging with the interactive element. These can live On-Demand or on a linear channel
- Branded Video On Demand folder, housing branded content and potentially related programming

Brand Microsite/Showcase

A fully branded, immersive destination, accessible through a variety of entry points (menus, banners, enhanced spots) that offers viewers multiple layers of interactivity as well as access to robust feature sets and branded content—including games, short form video, long form video, product information, RFIs, etc. Brand microsites and showcases can live on a dedicated channel or OnDemand.



Source: BrightLine, Unilever, TiVo, DirecTV

Branded Theme

Consumers select and apply a branded theme to personalize their console gaming experience.



Source: Xbox Live

Promotions on Demand

A VOD destination where consumers can select and receive valuable offers as well as watch branded video content.



Source: BrightLine, Time Warner Cable, Unilever

Broadband/VOD Sponsorships

Ads running within or adjacent to non-linear broadband delivered of VOD content. These sponsorships enable marketers to seed branded long-form or short-form content within or adjacent to relevant programmatic content.



Source: BrightLine, Xbox Live and Unilver

Static Billboard

A branded, static roadblock can be accessed from a variety of entry points and used to communicate key product information, distribute RFIs, or generated high-impact ad impressions.



Source: BrightLine, Jim Beam, DirecTV

Widgets

Applications available on internet-connected TVs that offer a fully immersive branded destination in which viewers can dynamically receive information such as banner advertisements, links to videos and/or transactions. Widgets are available through either the service provider or the Consumer Electronics manufacturer. Widgets can be accessed in a number of ways, including a marketplace, a top- or lower-third overlaid carousel, or a widget menu.



Source: BrightLine, Yahoo! Connected TV, Verizon FiOS, and Samsung

Games

Viewers can engage with a brand via various skinned and customized games that educate and entertain simultaneously. A wide variety of examples exist from casual game (memory, puzzle, matching, quizzes, trivia, etc.) including logos or product images to complex, multi-level, or multi-player custom or skinned games.



Source: BrightLine, Xbox, Red Bull and McNeil

Customized Applications/Commerce

A wide variety of complex applications are now available across TV platforms. These applications include standalone branded games and applications allowing for the purchase of products through an iTV interface. Local retail locators can also be incorporated into custom applications by viewers entering their zip codes to find the nearest locations for branded events or product offers.



Source: BrightLine and TiVo

Lead Generation Capability (a.k.a. Request for Information (RFI))

Viewer grants permission for the advertiser to contact (Send sample, brochure, email, enter sweepstakes) via request for more product information. Contact information is either taken from viewer's television service provider or is entered through an interactive interface.



Source: BrightLine, Unilever, Jim Beam, DirecTV, DISH Network

Click For Callback

Viewer grants the advertiser permission to call via phone, and phone number from account is provided to advertiser for prompt action.



Source: TiVo

Survey, Voting, Polling

Questions designed to solicit information from consumers, or encourage longer brand engagement. Voting can be incorporated into an on-screen overlay for a single-location interactive experience, or can be included in the features that are accessed from a showcase/microsite.



Source: Time Warner Cable Media Sales

Telescoping to VOD or Brand Destination

When viewers select, they are directed immediately to the VOD or brand channel.



Source: Time Warner Cable Media Sales

Social Media

Advanced TV can integrate social media to drive viewers to Facebook or Twitter, as well as allow viewers to "Like" a brand on Facebook via their remote controls.



Source: BrightLine, UniLever

Interactive Product Information

Viewers can browse through product information by scrolling through a dynamic, interactive product page.



Source: BrightLine, Unilever and Burger King

Video Gallery

Viewers can browse through a library of branded video content, giving additional reach and value to existing content distribution strategy.



Source: BrightLine, Red Bull, Xbox

Data

With the advent of set top box data from millions of homes and the merging of other data sets to increase the power measurement, advertisers are being provided deep insights into the outcome of their interactive TV media campaigns. These insights are ultimately informing and effecting other sectors of their media spend: Experian segmentations, purchase intent data, online data, and many other powerful pieces of third party reporting are being joined with interactive TV data to deliver meaningful learnings.

- **Using STB data**, marketers are now able to measure each remote control click to and within an ad experience, gain an understanding of promotional efficacy, feature interaction, time spent as well as overall viewer engagement patterns
- **Cross channel impact** can also be measured using STB data and a slew of other technologies (QR codes, mobile text in logs, online direct traffic, hash tags, etc.), by overlaying TV activity with boosts in mobile, online, and social participation
- **Channel conversion data**, enabling marketers to track click-through from spots up to a week after airing, bring a new level of understanding to TV ad dollars
 - o Tracking CTRs and cost per clicks across day parts and networks drives more informed optimizations across both interactive TV and traditional TV buys
 - o RFI data retrieved within these TV experiences send viewer names and addresses to an advertiser – a true TV opt-in that can then be tracked post campaign
- **Paired behavioral studies** comparing exposed vs. unexposed viewers supplement STB data to give directional insight into the effectiveness of brand messaging and its impact on purchase intent, brand affinity, and other key performance indicators

- A large scale push to actually quantify the value of engagement has resulted in the industry's move to integrate viewing and purchase data across TV platforms to deliver a true read on TV advertising's impact on sales
- With some of today's systems already combining viewing data across digital TV platforms with Experian demographic segmentation data to drive deeper insights, key partnerships will soon enable marketers to tie in retail, auto, and online data to return a true ROI on their TV ad dollars
- Custom data matches used by some of the most sophisticated brands are helping to track viewers all the way to purchase.

iTV's ability to mine data for insights to launch more impactful campaigns can have influence like no other channel has before, initiating a more efficient use of dollars as well as a more effective means of design

Privacy

Building viewer comfort with interactive TV will prove essential to growth and adoption. Designing privacy protections into interactive RFIs will help build trust essential to its success.

Interactive television provides opportunities for developing the consumer trust that may be absent in ephemeral internet transactions. ITV is typically provided through an ongoing subscription relationship in which the collection and handling of personally identifiable information is subject to federal privacy regulation and is carefully defined by subscription agreements between iTV providers and their customers, by privacy notices, and by other means of consumer education. Advertisers should fully understand iTV providers' specific policies regarding privacy, because consumer expectations are shaped by the iTV provider who is collecting information to help fulfill an RFI campaign. For example, if the information collected is to be used for more than fulfilling the viewer's request (such as being shared with other advertiser partners), then consumers must be informed and be provided the opportunity to consent. According to Common iTV practices to protect privacy include:

- Use of "trusted third party" for a blind match of subscriber and marketer data
- Use of widely available demographic information that is not personally identifiable
- Implementation of multiple "opt-out" mechanisms for privacy-weary consumers
- Strict and secure data encryption standards
- Mandatory destruction of all mailing data by all parties in the value chain upon campaign completion

An iTV Product Deep Dive – RFI

- **What is RFI?**

One of the leading, and most engaging and measurable interactive TV products offered today is RFI—Request for Information. In iTV an RFI is the capability through which the viewer requests, through the Cable, Telco or Satellite TV provider, to receive information from the advertiser such as a coupon, a brochure, a sample or another offer. Through an on-screen interface, the Advertiser extends an offer, and the viewer, in turn, uses the remote control to request receipt of the offer. RFI's technical capabilities present multiple ways of allowing a user to opt-in to receiving the offer. Traditionally, the viewer responds by using the remote control to select YES, OK, or choosing SELECT, allowing the TV provider the permission to instruct the Advertiser to send the offer. Advances in RFI's user experience and multi-platform integration have recently incorporated the use of a mobile device or tablet to complete offer selection, choose alternate methods of fulfillment such as e-mail delivery or simply deliver deeper richer content about the brand beyond the :30 second spot.

- **Why use an RFI?**

Identify and initiate a relationship with the most interested consumers

Advertising has become more of an interactive medium, and now an Advertiser is able to use interactive television opportunities to engage viewers and invite them to interact directly through an RFI. This allows the Advertiser to send interested viewers product specific items. The use of RFI and the subsequent interactive participation by the viewer creates an engaging experience and one that enables an Advertiser to connect with an interested consumer. RFI products enable advertisers to add the dimension of measurability to what has usually been considered an impressions-based buy.

Real-time campaign management

By using an interactive RFI in a local or national spot the Advertiser can fulfill requests directly to interested consumers. Through various types of usage metrics, Advertisers can also gain valuable insight into the types of offers, interaction rates and product categories that resonate with viewers. Real-time RFI interaction with consumers and its corresponding reporting enable Advertisers to monitor and manage offers, fulfillment materials and interactive campaigns more effectively.

ROI of an iTV RFI

Most iTV providers will share absolute numbers associated with RFI campaigns such as total interactions and leads. Using an RFI also allows an Advertiser to measure multiple engagement points with a viewer: lift on brand recall, brand opinion, brand awareness and overall purchase intent. iTV RFI is not simply a tool to measure requests – it is a new way of measuring the overall engagement of potential customers in a way that has not been available through traditional television media. As ad dollars shift to accountable media, one of the core benefits of the RFI product is enhanced metrics coupled with the element of engagement, allowing Advertisers to better evaluate their campaigns.

- **What can an RFI campaign be used for?**

RFI is a very powerful engagement and lead generation tool. When someone exposed to an interactive ad on their TV chooses to receive more information, they are essentially using their remote control to identify themselves as a potential customer. Therefore, Advertisers should consider the type of fulfillment option and the delivery.

The offered item in an RFI campaign should be something that is related to the product lifecycle and is relevant to the consumers – a coupon, rebate offer, sample, brochure, sweepstakes offer, or something else of value. To date, the more successful campaigns have been those where the Advertiser uses fulfillment pieces of high value. The offer can be for a physical item, like a brochure or sample that is sent via US mail or other physical delivery service provider. If the platform allows, Advertisers may be able to send an email, an SMS or initiate a call back. When using electronic fulfillment, it is important to incorporate immediate action capabilities, such as links to add directly to add to shopping carts or check out or share via social media. All physical and electronic fulfillment options can effectively drive to an incremental online or offline transaction.

It is advisable that an Advertiser expressly convey to the viewer that supplies are limited if the fulfillment item is of limited quantity. Advertisers should work with the iTV RFI provider to help with planning and managing fulfillment house inventory levels.

- **What information needs to be included for consumers when they choose to receive an offer?**

There may be limitations on the kinds of offers different iTV providers will allow an Advertiser to make. Most iTV providers will require that the offer explicitly states what the consumer will receive so that consumers understand what they are choosing to receive. Viewers expect to know precisely what the offer is and how it will be delivered. For example, the following copy, “Sign up to receive a monthly email newsletter with the latest tips and tricks, information, and coupons” is recommended versus copy that reads, “Sign up for an email newsletter.” Service providers report negligible customer care contact regarding RFI when expectations are clearly set in the RFI copy.

- **What information is required for fulfillment?**

Depending on the type of offer and method of fulfillment (physical or electronic), it is important for an Advertiser to understand the capabilities of the iTV provider and what can and cannot be accommodated by an iTV RFI campaign. Close coordination between the advertiser and the iTV provider is required to ensure that data policies are adhered to for fulfillment.

- **How often can campaign performance information be obtained from the iTV provider?**

Performance reporting varies by iTV provider. It is important that an Advertiser understand the frequency and metrics that will be provided with each campaign. It is also recommended that an Advertiser consider the fulfillment vendor costs as some will charge processing fees each time a new list of contacts is received. Advertisers should manage costs based on the value of the offer, the type of fulfillment and expectations of the consumer.

- **How should the Advertiser handle fulfillment? Can the Advertiser's fulfillment house manage the process?**

If the Advertiser is not equipped to manage the fulfillment process, it is recommended that they consult their iTV provider. In many cases, the iTV provider will have pre-approved fulfillment partners. One resource for identifying fulfillment companies is the Mailing and Fulfillment Services Association. It is important to understand if there are additional fees that will be incurred.

- **What does the campaign look like?**

Each iTV provider has a different execution based on where the iTV RFI offer appears (in a local ad, in a national ad, in a program), how the viewer interacts with the offer and what the viewer experiences. For example, some iTV providers have access to viewer information so consumers simply have to accept the offer. In other cases, viewers are presented with an initial offer screen and then a second, confirmation screen as a precautionary measure against inadvertent choices by viewers. This precaution ensures a higher quality list of qualified prospective consumers, which should lower the total cost to the advertiser by reducing the number of fulfillments to recipients who did not wish to engage with RFI.

- **Entry Points:**

Overlay on Spot:

An RFI offer can be presented to the viewers as an overlay within a national or local spot. For example, the viewer may be watching a commercial and a graphic overlay will appear with copy instructing the viewer to interact by pressing "OK" or "Select" on their remote control. Depending on the iTV provider, two things can happen: the viewer is asked to confirm his or her intention to receive the offer--all within the advertisement while it is airing--or the viewer may "telescope" to a different channel or environment such as a Video-On-Demand asset and execute the request by entering his or her fulfillment information. Each offer has its own advantage; for example, by making the RFI respect the :30 second spot, it enables the viewer to engage with the ad while not intruding on the underlying content to which he or she was tuned. Telescoping to other platforms can provide deeper, richer content and is especially valuable for more involved and higher dollar purchases such as automotive.

Part of a separate interactive application and environment:

An RFI offer can also be included as part of a separate iTV Dedicated Advertiser Location (DAL) or Microsite depending on the iTV provider. DALs can support various interactive features as they operate as separate interactive environments. If a viewer enters a DAL, he or she may be able to engage with an iTV RFI offer and have the item fulfilled through physical or electronic channels. After completing the request, the viewer can continue to navigate and interact within the DAL.

- **Making the Request**

Once an Advertiser has made the offer, it is up to the viewer to choose to receive the offer. The user must provide permission before information can be passed by the iTV provider to the fulfillment party. The viewer choice can take the form of any confirmation button press – “Would you like to receive a brochure from [Advertiser]?” The user must select the “Yes” option in order for the Advertiser to execute the fulfillment. Or, the choice can be confirmed by the viewer entering and submitting their fulfillment information. For example, “Enter your email address and press submit to receive an email newsletter from [Advertiser]”. Some iTV providers will require a choice screen and then a separate confirmation screen to ensure that the consumer understands and consents to allowing the iTV provider to use the viewer’s contact information for fulfillment.

The Form

If the iTV provider requires information to be collected at the time the information is requested, the functionality needs to include a form to capture fulfillment information for the viewer. The iTV provider will collect the information based on how the Advertiser intends to deliver the request. If the Advertiser intends to deliver a coupon via email, the viewer’s email address is collected. If the fulfillment item is a brochure and the Advertiser intends to fulfill via regular mail or physical delivery, the Advertiser should consult with the iTV provider about how the mailing address is collected, stored and transmitted. In some cases, the Advertiser can contact that viewer via the collection of home or cell phone information. The Advertiser should consult the iTV provider. In many cases, the billing address on file can be used once the viewer opts in to receive the offer to their home address.

Keyboard/Triple Tap

In order to enter fulfillment/contact information into the RFI form, the application may include an on-screen keyboard and/or triple tap functionality through the remote control. Triple tap is a numeric to alpha conversion method made popular through mobile devices. For example, typing the number 2 on the remote can represent the letters “A, B and C.” The first tap of the number 2 returns an “A,” the second a “B,” and the final a “C.” The remote obviously needs to be labeled appropriately for triple tap to be a usable method and due to the length of time it can take to complete, it is best compatible with telescoping to VOD or video squeeze back where the experience is not bound by the ad’s length. New alphanumeric remotes and devices such as tablets simplify data entry.

Auto-population

There are instances in which the iTV provider may employ auto-populate features, or offer to auto-populate the fields in the form with the household address(es) on the account. If auto-populating, the viewer should be allowed to overwrite the auto-populated information using the on-screen keyboard or by triple-tapping. It is advisable that the Advertiser has a complete understanding of the number of steps and the interface that will be used by viewers where personally identifiable information will be entered.

- **Fulfillment**

When the viewer submits a request for information, the iTV provider will collect the information in accordance with their policies and procedures and will either act as the fulfillment party or pass the information to a certified third party. Advertisers should understand the individual iTV provider policies and methods by which viewer information is sent, received and stored. Once received by the fulfillment house, it is the responsibility of the Advertiser to fulfill the requests with the item in a timely matter. Fulfillment contacts with the Advertiser should be provided to the iTV provider in the event that the iTV provider receives a customer service call by a viewer who has questions about the RFI.

Fulfillment Houses

Fulfillment houses may be used by the Advertiser, or by the iTV provider on behalf of the Advertiser, to fulfill the requests generated by the RFI. Each iTV provider is different and the Advertiser should consult with their iTV provider. Advertisers should expect to incur the per-piece costs for fulfillment including development and mailing where applicable.

RFI Pricing Models

There are as many ways to price iTV RFI as there are ways to use iTV. An additional layer of complexity is added because interactive TV is often planned by different groups (direct response, interactive, national or spot TV buying) and each of those groups typically values an interaction differently. For example many direct response buying teams want to pay for media on a cost per lead basis, but because interactive TV campaigns are often built on inventory that is in short supply, media sellers are often unable to put campaigns together on that basis.

For platforms that involve the addition of a request for information over more traditional inventory (like :30s) pricing is often based on the base cost of that inventory plus some kind of premium for the interactivity. For platforms that offer a stand-alone interactive experience (like a branded interactive channel created for a marketer) RFI capability is often priced as part of a package.

Marketers may wish to evaluate RFI capability by the media value provided, the value of the data shared (whether it be name, address, email or more,) and the ability to use that data more than once. Some media, to protect the privacy of their customers, don't share any personally identifiable data, but rather include aggregate reporting data. These typically also include fulfillment costs in the campaign and fulfill consumer requests directly.

Often after the campaign is completed, marketers will compare reported requests with campaign costs in order to calculate what the campaign cost on a per-lead basis, regardless of whether the campaign was priced in that manner. The challenge there is that that such models often fail to take into account the other benefits like branding that an iTV campaign can deliver and on which so much traditional linear TV has been built. For that reason, each campaign should be evaluated individually.

RFI Success Metrics

In the old days of iTV a campaign would be deemed "successful" if the mechanics worked; that is, if the spot or branded interaction played, if the RFI overlay or module was available and if the consumer got the information they'd requested. For many marketers, unfamiliar with interactive television, success today sometimes still boils down to "Did it work?"

Those more experienced in the space are able to measure how campaigns change consumer behavior depending on factors like creative, offer (coupon versus sweepstakes versus sample) or media placement. If the marketer changed the channels on which they ran the commercial, the timing of the overlay, the day parts purchased, the spot itself, the banner ads on the shared channel, the long form video content, the sweepstakes call to action or even changed the offer to a sampling campaign, the final number of requests for information would be impacted. For that reason, marketers can and should look at metrics all along the consumer experience. The operator can share a number of metrics for each portion of the campaign, along with basic information about the geography and number of households in which the interaction was available:

- Thirty second spot: number of spots run on each network at each time (as part of media schedule), Nielsen estimated viewing within on a household basis, total number of individual telescoping overlays presented and actions taken, total number of households reached, unique households reached, total number of set top boxes reached.
- Shared branded channel: number of overall views of the channel and therefore, of the marketer's banner ads, number of video plays initiated, number of trick play actions taken (rewinds, fast forwards, pauses), average length of view.
- Request for information: number of actions taken and actual consumer data including name, address, email address and phone number, number of duplicate requests for information.

Media providers are often able to provide insights that help marketers. For instance, in one example, the cable company's research team shared a range showing the highest and lowest numbers of requests for information that other marketers in the same category, with a similar offer, using that shared branded channel, had received. They were also able to provide a chart showing how when a video play accompanied a sweepstakes or sample offer, average video play length tended to go down, likely because consumers knew the offer was available and wanted to go to it immediately. These types of insights help marketers keep their own results in perspective.

Different iTV platforms rely on different types of reporting tools, often for the same media provider. In the example above, the cable operator used Nielsen's data for household counts and post campaign estimated viewing reporting, their own server logs for number of overlays delivered, number of set top boxes reached and actual consumer reporting information, and relied on third party tags (Omniture) for video-on-demand viewing metrics.

In another campaign, a different interactive tool using request for information was used. In that campaign, the interaction occurred within the :30 spot itself. While watching the commercial, the consumer was presented with an overlay inviting interaction. Once the consumer interacted, the commercial itself was squeezed back into the corner of the screen and an initial offer was presented to the consumer. If the consumer confirmed that they wanted to participate they received a confirmation screen, and were then taken back to the programming, while their information (name and address only) was sent to the marketer. Clearly the interaction itself has an impact on the ultimate number (and quality) of RFI responses received. One study demonstrated that consumers may find interactive spots more memorable than non-interactive spots, so RFI count alone need not be the final measure of success.

Data

Privacy

Building viewer comfort with interactive TV will prove essential to growth and adoption. Designing privacy protections into interactive RFIs will help build the trust essential to its success.

iTV provides opportunities for developing the consumer trust that may be absent in ephemeral internet transactions. iTV is typically provided through an ongoing subscription relationship in which the collection and handling of personally identifiable information is subject to federal privacy regulation and is carefully defined by subscription agreements between iTV providers and their customers, by privacy notices, and by other means of consumer education. Advertisers should fully understand the iTV provider's specific policies regarding privacy, because consumer expectations are shaped by the iTV provider who is collecting information to help fulfill an RFI campaign. For example, if the information collected is to be used for more than fulfilling the viewer's request (such as being shared with other advertiser partners), then consumers must be informed and be provided with the opportunity to consent.

Data Usage Compliance

Also, as with the online interactive campaigns, it is important for the viewer to know exactly how their information will be used. Is it only going to be used for fulfillment of this particular RFI? Will it be used for future marketing from that advertiser? Will it be shared with other advertisers?

If an Advertiser is offering entry into a sweepstakes, it is likely that pertinent rules are clearly presented. It is important that an Advertiser work with their internal legal teams and the iTV provider to ensure that appropriate State and Federal regulations are met.

What kinds of capabilities are needed for exchanging the viewer Personally Identifiable Information?

Personally identifiable information is sensitive data. It will likely need to be encoded before it is transferred; a secure method of transferring the data will need to be established. Each iTV provider will have their own legal requirements for protecting the viewers' privacy. In all cases, Advertisers must confirm with the iTV provider for permissible uses.

Not all RFI implementations require personally identifiable data to be shared. Non-fulfillment versions of RFI such as RFI-Survey only ask for opinions regarding brands and products, and therefore are generally reported using response percentages only (i.e. 36% of respondents selected Answer A, while 64% selected Answer B).

iTV COPPA

The **Children's Online Privacy Protection Act of 1998 (COPPA)** is a US federal law that details the responsibilities an Internet Service provider has to protect children's privacy and safety online including restrictions on marketing to those younger than 13. While not currently regulated under COPPA, the FTC has expressed interest in including iTV. Knowing that the intent of COPPA is to protect children, Advertisers that choose to engage children in an iTV context should exercise COPPA practices and require parental consent when collecting information about children under the age of 13.

• RFI Case Study Examples

A world-leading credit card issuer cashes in on Xbox LIVE entertainment fans.

Marketing Challenge

The US Credit Card industry is extremely competitive, with over 576M cards in circulation¹. Factor in an overall 4% purchase transaction decline in 2009 due to the economic downturn — then account for much stricter credit card industry regulations — and it's easy to see why credit card issuers were scrambling to find new ways to maintain customer loyalty and activity.

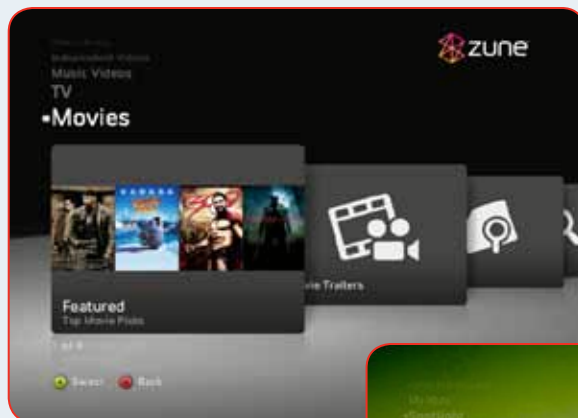
One of the nation's leading credit card issuers found a truly unique and effective way to promote transaction activity amongst its members by partnering with Xbox LIVE.

Solution

For this leading financial institution, Xbox LIVE offered a powerful, untapped platform that goes far beyond connecting with gamers to reach adults 25-54 who are entertainment enthusiasts. Millions of people use their Xbox LIVE membership to access television shows, movies, music and social networks, including Facebook and Twitter. And that number continues to grow at an impressive rate every day.

The campaign on Xbox LIVE and Xbox.com offered credit card members exclusive opportunities to earn Xbox LIVE points by using their card — and as a result, drive financial transactions. By seizing this opportunity to connect with entertainment aficionados in an engaging new way, Xbox LIVE not only provided a powerful new media vehicle, it also delivered incredible results.

¹ Neilson Report, February 2010



Results

Over two thirds of those who saw the ads clicked on them, and of those that responded more than a third participated in the transaction-based promotion.

Ad effectiveness research verified a solid lift across key brand metrics and behaviors:

- +25% lift in Brand Rating, Brand Consideration and Brand Recommendation
- +60% lift in agreement that “this card is the best for online purchases”
- Nearly 50% of users who saw the campaign went to the company’s website for more information

Most importantly, the company saw a double digit increase in reaching their ultimate goal of credit card usage.

Conclusion

Xbox LIVE is well known for delivering an engaged gaming audience, but this campaign proves that Xbox LIVE is a hugely effective medium for reaching a broad entertainment audience. And perhaps of greatest significance is the fact that Xbox LIVE clearly offers financial institutions a new platform for achieving impressive marketing results.

Metric	LIFT (recall ad vs. unexposed)
Brand rating	+25%
Brand consideration	+25%
Brand recommendation	+25%
Agreement this card is best for online purchases	+60%

A Sweet Story for Reese's and Xbox LIVE®

Marketing Challenge

Reese's knows the media habits of their 18-34 target audience has evolved beyond TV. Their challenge was to meet this evolution head on by finding new ways to deeply connect and excite their core consumer. Their goal was to generate passion and excitement about the brand and ultimately drive sales among their target customers who don't spend all their free time watching TV.

Solution

Since 57% of the Xbox Live 18+ Audience does not use TV as their main form of entertainment, the platform offered Reese's a way to reach a segment of their consumers who would miss their TV ads. Through a visually rich Branded Destination Experience (BDE) that included a Guitar Hero 5 Play and Win and a Halloween Avatar costume contest, Reese's not only reached this target but remained at the forefront of consumers' minds throughout the campaign—a strategy that proved to be very successful.

"Integrating Reese's into Xbox LIVE allowed us to reach our target consumer in a unique and interactive way. By activating brand integration in to the online gaming space, we had the opportunity to excite & engage our Reese's fans. Xbox definitely helped us bring the perfect combination of chocolate & peanut butter into the spirit of Halloween"

—Jeff King, Sr. Brand Manager—Reese's, The Hershey Company



Results

The campaign was one of the best performing campaigns in Xbox LIVE history with click through rates as high as 10% and over 1.4 million contest participants. Users also responded strongly to the Reese's content, with over 124,000 streams of the Reese's ad. Not only were users self-selecting to play the ads, but more importantly, Reese's was able to successfully engage with their hard to reach target audience. In addition, the Ad Effectiveness study illuminated other campaign highlights:

- 53% entered to win prizes by voting for their favorite Avatar Halloween costume
- 42% entered to win prizes by downloading a gamer pic and playing Guitar Hero 5
- 125,000 views of the Reese's commercial occurred through the BDE
- 38% downloaded the Reese's theme pack

The advertising effectiveness study also demonstrated the campaign's success in engaging users to interact with the brand:

- When asked which chocolate candy brand they would consider buying, those who saw the ads were 31% more likely to choose Reese's as the top brand they would purchase over any other brand. Additionally, they were 10% more likely to recommend Reese's as the top brand of chocolate candy.
- After seeing the campaign, 40% went to a local shop to purchase and eat Reese's candy.
- 56% of XB LIVE members who saw the Reese's ad had a more positive opinion of the brand after exposure.

By extending its reach beyond TV onto Xbox LIVE, the brand connected with its target audience in a meaningful way with a contextually relevant contest and rich content. The lifts in purchase intent, brand consideration and recommendation, clearly show Reese's satisfied consumers' craving for innovation, interaction and their sweet tooth's.

Source: 1 Simmons Spring 2009 Study A18+

*Research Methodology

Xbox LIVE worked with research company Interpret LLC, to recruit 809 male and female Xbox LIVE gamers aged 18–34. The respondents were divided into a pre group (did not see campaign) and post group (opportunity to be exposed to campaign on Xbox LIVE). Both groups answered an online questionnaire that measured their awareness, opinions, and engagement with the brand.

What's New in iTV

Over the past year, iTV proponents and providers have made great strides in countering the medium's weaknesses and taking advantage of opportunities. Of most considerable noteworthiness are efforts spearheaded by Canoe Ventures to safeguard and brand iTV with a trusted and common logo across service providers and Cablevision's answer to agencies' most sought after iTV feature, electronic fulfillment.

• ExpandTV

In October 2011 Canoe Ventures announced the rollout of ExpandTV. The result of an industry-wide brand initiative led by Canoe, in concert with the Cabletelevision Advertising Bureau (CAB), the Cable & Telecommunications Association of Marketing (CTAM), Cable Television Laboratories (CableLabs(R)); leading cable operators (Bright House Networks, Cablevision Systems Corporation, Charter Communications, Comcast Corporation, Cox Communications, and Time Warner Cable); as well as national advertising and cable television programming partners, The ExpandTV logo indicates that a program or ad is interactive and trustworthy. Since the inception of QUBE, privacy concerns have impeded iTV's widespread adoption to varying degrees. ExpandTV was created as a television service provider seal of approval, to dispel hesitation a viewer may have when interacting. The logo may sit alongside other brands and content, as a co-branded interactive experience.

• Email Fulfillment



Cablevision, the 8th largest television service provider in the United States, has successfully launched one of the most asked for iTV features from the advertising agency's perspective, electronic /email fulfillment. In June 2011 Cablevision announced deployment of Optimum Select RFI with email fulfillment from a 30-second spot. The new capability allows viewers to receive more information about brands and offers via email. ICE Enterprise ran a two week email fulfillment iTV campaign for Royal Caribbean Cruise across Cablevision's New York metro service area. Giving advertisers the ability to send viewers an email offer from a TV commercial, whether in the form of a direct offer, e-brochure or coupon, is a cable industry first.

The campaign generated a total of 3,000 unique email leads over a two week period. The offer redemption rates were 24 percent—more than double the industry average for conventional email campaigns.

Other groundbreaking innovations on the periphery of iTV's landscape include advancements in Video on Demand Dynamic Ad insertion (VOD DAI). DAI on VOD creates additional non-linear advertising revenue streams for all involved parties in the advertising ecosystem. VOD DAI allows ads to be inserted and refreshed in pre, mid and post-roll positions, so that advertising is always fresh and relevant. Comcast and NBC-U have been first to offer VOD DAI capabilities, and even though the initial advertising content is not interactive, multiple members of the interactive community are looking to bolt on an interactive element on their roadmap, further increasing the unit's value.

Overview of the iTV Ecosystem

Distribution Platforms

For years, Interactive Television was talked about by many, but seen by few. In the U.S., iTV had long been relegated to limited trials in a handful of markets -- and a snazzy booth at an industry trade show. But competitive pressures have now compelled the industry's key players to add an "I" to their "TV" offerings.

- **Satellite**

iTV applications on DirecTV and DISH are now available on 25 million sub homes. By 2012, DBS subscriber growth will peak at 32MM and an estimated 99% will have iTV STBs (Source: SNLKagan)

- **Cable**

MSO's are prepping systems for ETV-EBIF and tru2way interactive programming, services and advertising. EBIF is the technical name for a cable mechanism to deploy interactive TV, at scale. The tru2way brand is a consumer-facing name for a set of technical specifications that enable cable to provide interactivity. By 2012, ETV-EBIF will reach an estimated 50MM. Cable subscribers & tru2way 34MM (Source: SNLKagan)

- **Telco**

AT&T U-verse and Verizon FiOS have grown to over 6.2 million subs. Both systems are actively promoting iTV, especially weather-on-demand services, as a key feature. By 2012, Telco TV subscriber growth in the US is projected to hit 10MM subs (Source: SNLKagan)

- **Internet Connected TV**

Consumer electronics companies are blitzing the market with a plethora of Internet-connected TV's, STB's and devices featuring iTV portals and widgets. VIZIO, Samsung, Sony, Toshiba and LG have introduced HDTV's with Yahoo! Connected TV built-in since 2009. The Yahoo! Connected TV platform includes more than 140 TV apps, and the publicly available widget development kit (WDK) enables developers to create, deploy and monetize TV apps through Yahoo!'s Connected TV store. By 2012, 65MM households worldwide will be able to use TV's to go online. (IMS Research)

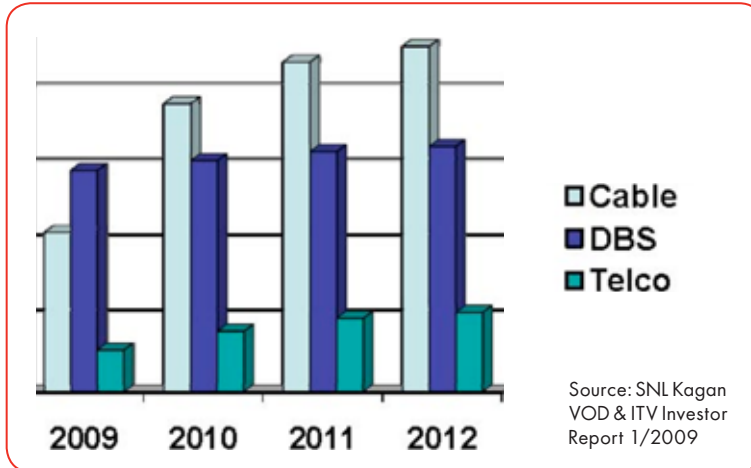
- **Game Console**

General console growth and usage of Xbox 360, Wii, and PlayStation 3 continue at a solid pace, evolving from gaming to entertainment (TV, movies, video, music) and social media (text messaging, video/audio chat, Twitter, Facebook). Online services such as Xbox Live and PSN are driving innovation. Xbox Live has over 12.9 million subscribers in the US, while PSN has 10.MM.

• **Distribution Reach (Projected)**

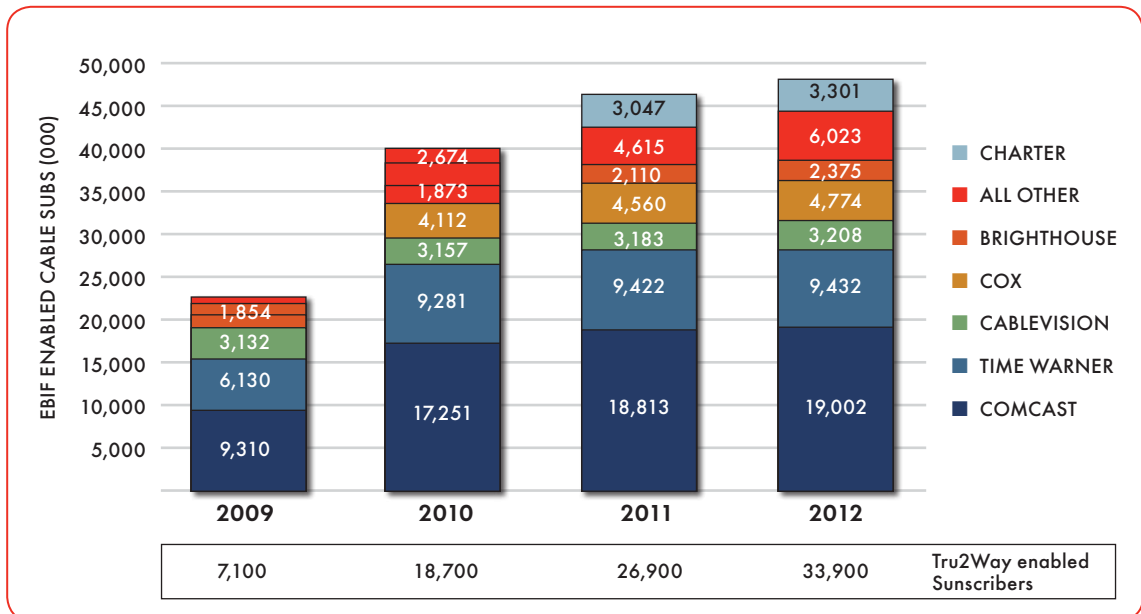
The ever-faster deployment of digital set top boxes is expected to greatly expand the availability of iTV for U.S. consumers over the next four years.

Set Top Box Distribution Through 2012



• **Projected Cable iTV Subs**

The cable industry is banking its near-term iTV future on EBIF (Enhanced TV Binary Interchange Format), an enhanced TV standard installed on essentially all legacy set-top boxes. EBIF is the mechanism that can make interactivity work across all digital set-top boxes. The MSOs will use EBIF to broadly deploy interactive programming—via bound and unbound applications (refer to glossary for definitions)—and addressable advertising. That said, the task of outfitting a critical mass of systems to accommodate EBIF will not happen overnight. Each of the MSOs is deploying EBIF at its own rate.



• **The Players**

The iTV ecosystem is growing and evolving, with players large and small, old and new, trying to stake a claim in an industry characterized by innovation and long-held promise.

Distributors

- Satellite
 - Direct TV
 - Dish Network
- Cable
 - Comcast
 - Time Warner
 - Charter
 - Cablevision
 - Cox
 - Bright House
 - Comcast Media Center
- Telco
 - AT&T U-verse
 - Verizon FiOS

Application Developers

- Alitcast
- Ensequence
- EnableTV
- Fourth Wall Media
- iTAAS
- Zodiac Interactive
- OpenTV

Advertising Solutions

- Canoe Ventures
- Navic (Microsoft)
- Fourth Wall Media
- Visible World
- Emuse
- Ensequence
- ARRIS
- BlackArrow
- Sigma Systems
- Concurrent
- BrightLine
- Backchannel Media
- Hulu
- Rovi

Devices

- Connected TVs & Blu-Ray Players
 - Yahoo
 - Sony
 - Samsung
 - LG
 - Vizio
 - Panasonic
 - Sharp
 - Anysource Media
- Set Tops
 - TiVo
 - Digeo
 - Cisco/Scientific Atlanta
 - Motorola
- Game Consoles
 - Microsoft Xbox 360
 - PlayStation Network
 - Nintendo Wii

Application Testers & Integrators

- CableLabs
- iTAAS
- Vidiom
- EnableTV

Emerging Platforms

An ecosystem of alternative platforms and devices facilitating video delivery has emerged which bypass traditional Cable, Satellite, and Telco television subscription services. These platforms and devices, sometimes referred to as Over The Top (OTT) video delivery, typically access content via the Internet (e.g. Roku, Vudu, Boxee, etc.) or through a digital terrestrial connection (e.g. Sezmi) using an alternative set-top box. OTT services offer a selection of live and on demand content through traditional subscription services as well as facilitate the delivery of Internet video content. A number of OTT devices, such as Google TV, act as companions to traditional subscription video services and seek to enhance the viewing experience through improved functionality (delivered through applications) and access to alternative video sources such as YouTube.

• iTV in OTT Advertisements

The ability to deliver OTT iTV is device-agnostic when an IP-adserving platform is created. Most of these efforts are in the start-up deployment stages. For instance, adRise has created a bidding exchange for video advertising on connected devices, allowing advertisers to deliver iTV without having to integrate with each individual platform. Currently, adRise can deploy iTV advertising on Roku, Google TV, Boxee, Samsung, Yahoo Connected TV and other device platforms. adRise has created an end-to-end solution which performs all the device detection, transcoding and video insertion. The only responsibility of the advertiser is to deliver the underlying creative spot.



adRise provides a publisher software development kit that allows all connected devices to display the same advertising. Unique campaign measurement is available, including viewership by connected device. According to CEO Farhad Massoudi, adRise has seen its ad inventory double every month over the last three months, and he expects that trend to continue at least through the end of the year.

Online TV operator Hulu.com, which fittingly gets its name from a Mandarin Chinese word with a secondary meaning "interactive recording," has launched an iTV product named Ad Swap, designed to allow users to choose which advertisements they watch during the program, instead of advertising being inserted using targeted demographic hypothesis. Hulu said it expects response rates to average around 3%.



With respect to metrics like brand recall, favorability and purchase intent, Hulu’s product research found that video ads which a user proactively selects among a choice of several (versus a typical video ad that is served) performed at a significantly higher degree than those that were not. The chart below details Hulu’s findings:

Metric	Traditional Random Ad Serve Performance	Interactive Ad Selection Performance	% increase due to Interactive Ad Selection
Unaided brand recall	30%	58%	+ 93%
Brand favorability	34 %	43%	+ 27 %
Stated relevancy	15%	22%	+ 46%
Purchase intent	23%	31%	+ 35%

• **OTT Supply and Demand**

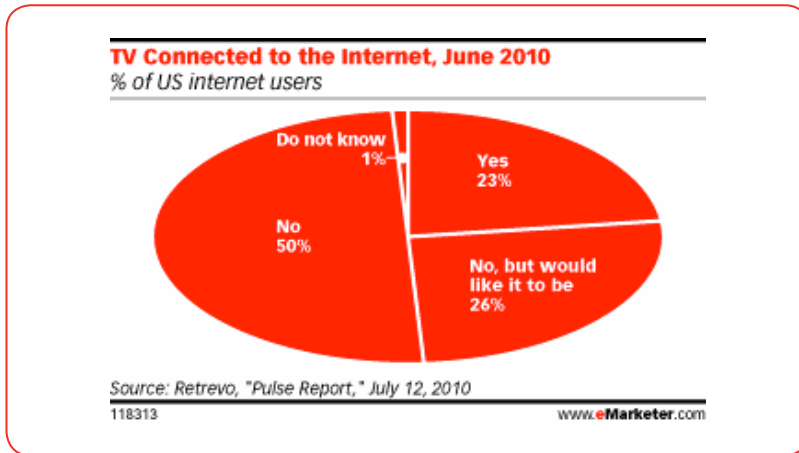
Today, video game consoles outweigh connected TVs in device usage for internet video viewing.

Internet-Connected Devices US Adults Use to Watch Online Video, Feb 2011
% of respondents

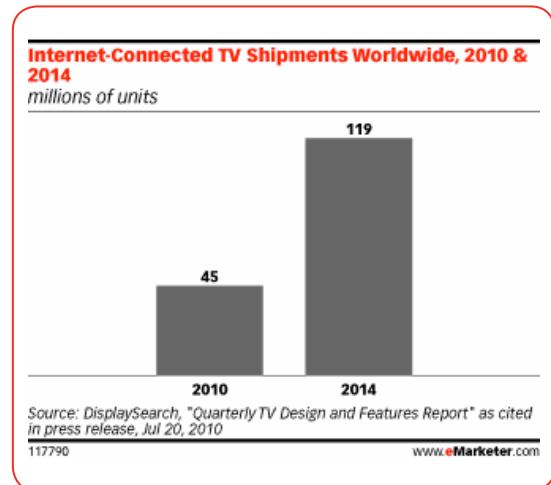
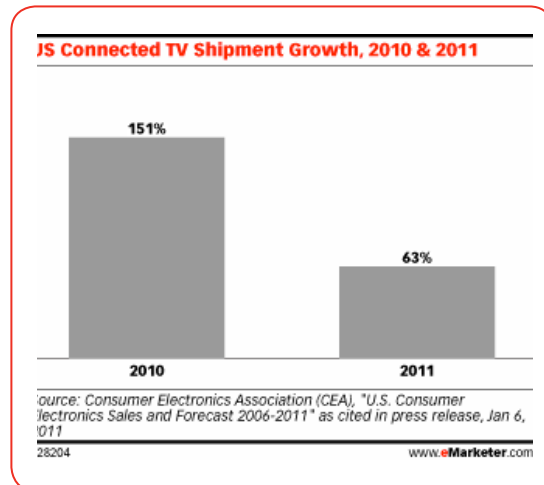
- 23%** of households have a video game console that is connected to the internet
- 10%** of households have an internet-connected TV
- 7%** of households have an internet-connected Blu-ray player
- 30%** of households have at least one connected device
- 10%** of adults watch online video via internet-connected devices at least once per week

Note: ages 18+
 Source: Leichtman Research Group Inc. (LRG), "Emerging Video Services V" as cited in press release, March 29, 2011
 126925 www.eMarketer.com

Nearly half of internet-using consumers either have a TV connected to the internet or would like to have their TV internet connected.



Many speculate that the OTT device distribution will shift in the coming years. Manufacturers are anticipating increased OTT adoption and are creating supporting shipment distribution plans. Growth in connected TV purchase is expected to occur internationally and domestically as detailed by the supply projection charts below:



In sum, the various elements that will increase iTVs OTT viability in the video landscape are projected to align in the coming years. Relevant consumers have a favorable outlook towards connected TV, the ability to monetize the content exists - as well as the technology to insert activity, and electronics manufacturers are setting supply to meet the need.

Current Industry Challenges and Remedies

Interactive Television has developed without an industry framework for technology standardization. As a result, the following challenges, as identified by the IAB Interactive Television Committee, have impeded robust development of the Interactive Television marketplace. In the last few years, the success of interactive ads in the web advertising space in driving consumer engagement and therefore ad efficacy has energized many players in the industry to redouble their efforts to offer technologies that can deliver interactivity to television.

Challenge	Definition
<p>Inconsistent Technology among the Multiple System Operators</p>	<p>Historically interactive capabilities and applications have been offered in a variety of portals, banners, and other experiences built upon a number of technology platforms, many of which are proprietary. These diverse and often incompatible systems evolved as a result of the naturally closed nature of television infrastructure. Additionally, as providers consolidated, the sunk costs of established infrastructure made it prohibitively expensive to homogenize even within a single company.</p> <p>Over the last 5 years, the cable industry has defined an iTV standard (EBIF) which will enable the cable platform to become homogenized and support a “write once, deploy anywhere” paradigm. The cable industry, is investing to further standardize the development and deployment of EBIF across the digital cable footprint. Verizon has also adopted the EBIF standard.</p> <p>Other iTV providers have chosen to adopt web standards to create interactive functionality. For example, Xbox Live and others support FLASH applications and ads. AT&T’s U-verse and other services that support widgets, allow the programs or ads to call out to a URL on the web to provide a rich interactive experience.</p> <p>These initiatives will support programmers and advertisers in delivering iTV experiences in a consistent, scalable, and economical way. In the meantime, an intimate and comprehensive knowledge of various operator capabilities is essential to a successful iTV execution.</p>

Challenge	Definition
<p>Lack of Standardized Metrics/Ratings to serve as currency</p>	<p>While there is growing consensus about the potential of interactive addressable advertising, the metrics that will be used to weigh advertising effectiveness remain undefined.</p> <p>There are many vendors working with several MSOs on how to navigate the privacy, business, and technical issues associated with capturing and effectively using set-top box data. As of now, the venture to move towards this evolution has not been a unified effort. In order for iTV metrics to be most useful for advertisers, MSOs and the technology providers will need to establish uniformity with the variables that will be reported, report with consistent time periods (i.e. daily, weekly, monthly), and ideally provide deeper, more actionable metrics for this addressable advertising space.</p> <p>While there is still much work to do, the industry is working to come together to come to a common set of metrics. Research firms are aiming to develop new currencies for networks and advertisers with which to conduct business, either supplementing or replacing the age-old Nielsen panels in some instances. Set-top box data seems to offer the golden key to not only targeting advertising messages directly to the highest prospects, but also the ability to report on that data (e.g., ad click-through rate, geography, time spent with the ad unit, features of the ad unit most used, etc.)</p> <p>One of the most significant developments in the past year has been the launching of the industry-wide initiative “Making Measurement Make Sense.” Created by the IAB, 4A’s, and ANA, the initiative has three primary objectives: Define transparent, standardized and consistent metrics and measurements to simplify the planning, buying and selling of digital media in a cross-platform world; drive industry consensus around the solutions; and establish a measurement governance model to support ongoing standards development, ensure compliance and manage change in a rapidly evolving media climate.</p>
<p>Perceived Lack of Scale</p>	<p>iTV adds a new layer of value to that principle, measuring success through engagement as well as scale.</p> <p>Inconsistent advertising experiences across MSOs can make it difficult for an advertiser to broadcast their marketing message to a large audience, experts in the iTV space are helping marketers to navigate the waters by streamlining scale across platforms and operators. While some MSOs may have similar advertising products, their varied implementations require an advertiser to re-author creative to adapt it to each MSO’s platform. This increases costs and reduces the budget available to spend on media. The varied platforms also generate different metrics which make it difficult to compare results across MSOs. Lastly, it is also often the case that MSOs will only support functionality across a portion of their consumer footprint due to technological variations (i.e. analog vs. digital subscribers, supported functions on individual set-top boxes, infrastructure differences, etc.). This further reduces the addressable audience for an advertising experience.</p> <p>These factors make it difficult for an advertiser to achieve the necessary audience aggregation for an effective advertising campaign with consistent and replicable results without guidance. The steps, as described earlier, to create standardization either through EBIF or web standards could go a long way towards ameliorating the scale issue.</p>

Challenge	Definition
<p>Lack of Clear Definition within the Marketplace</p>	<p>For years, interactive TV has been a sort of holy grail to Madison Avenue. But even now, with iTV finally reaching millions of U.S. consumers, the picture for advertising agencies and their clients, is promising, yes – but fuzzy, too.</p> <p>Programmers and distributors are pursuing the same goal – enhanced, addressable advertising – but rushing down different paths. For now, that fragmentation means advertisers can’t deliver the same campaigns, in the same way, and get the same metrics against a critical mass of consumers.</p> <p>And, without the assistance of an expert in the space to provide clarity, it is easy to fall into confusion as to what iTV actually is. Whether it’s iTV, eTV, IPTV, Web TV, Active TV, Advanced TV, etc . . . www.itvdictionary.com lists over thirty terms used to reference Interactive Television.</p> <p>With more than thirty names, a competing array of advertising solutions, and distributors pursuing different standards, it is difficult to get a grasp on what iTV is, and to understand the value it offers to advertisers.</p> <p>While there is significant work to be done to overcome the confusion in the marketplace, through industry forums like IAB, CTAM, CableLabs and documents like this, the ecosystem is starting to become more educated about interactive television. Further, key initiatives to create a national consumer brand for interactive television, educate the ecosystem and deploy national interactive TV applications and services will also help the natural consolidation of and clarification around marketplace definitions, much like the early days of the Internet.</p>
<p>Lack of Content by the Brand</p>	<p>The elements needed for an Interactive Television ad campaign are rarely considered during the creative planning process. This results in interactive TV campaigns being less effective or cost prohibitive. The necessary assets may be expensive to create once production has been completed of the other creative assets. However, they often wouldn’t add much too overall cost if created alongside the elements developed for use online or on traditional television.</p> <p>Outtakes or behind the scenes footage from commercial shoots can make great pay-off content when driving viewers from a 30-second commercial into an interactive experience. Additional graphic sizes may be easy to include when requesting various sized treatments from a creative shop. Brand managers, planners and creative agencies should be aware of the requirements for the various platforms so that these elements can be created to be a cohesive part of a campaign, not an afterthought. Please contact the publishers to find out more about the technical requirements to publish interactive campaigns on each platform.</p>

Challenge	Definition
<p>Lack of Awareness/ Misinformation About the Space</p>	<p>One significant challenge facing interactive television is perhaps the simplest: a lack of consumer and marketer awareness that such advanced technology even exists.</p> <p>On the consumer side, this lack of awareness prevents viewers from engaging freely with applications, as there is a natural apprehension to interact with a totally new technology that has yet to be popularized or commonly acknowledged. This unawareness can be aggravated by the lack of standardization of interactive TV among TV providers, as a clear “interactive TV identity” has yet to be established between viewers and advertisers yet. This lack of awareness is not a result of a lack of interest; in fact, viewers have shown over the years to be profoundly receptive to new digital technologies and opportunities, when made easily available.</p> <p>As for marketers, a lack of education regarding interactive TV can further hinder its progress. Limited knowledge/misinformation about interactive TV’s capabilities and performance can negatively influence its presence in the marketing mix, and as a result only further impedes interactive TV’s permeation into viewing habits. These complications, however, can be remedied over time, as marketers become more and more aware of interactive TV’s proven success, and integrate it more fully and more upstream in the planning process.</p>

Who is the IAB Interactive Television Committee?

The Interactive Television Committee was formed in March of 2009. The goal of the Interactive Television Committee is to implement a comprehensive set of measurement and creative guidelines for Interactive Television Advertising, as well as educate the marketplace on its strengths. The Committee has defined Interactive Television as Interactive Advertising occurring inside a television environment.

• Co-Chairpersons:

Chris Falkner, VP – Advanced Advertising Technology & Operations, NBC Universal Digital Media
 Jared Iwata – Director of Advanced Advertising Products, Time Warner Cable.

The Committee consists of various players in the Interactive Television ecosystem. The Committee will continue to grow as more interested parties become members of the Interactive Advertising Bureau. The current members of the Committee are:

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|-------------------------------|-----------------------------|-----------------------------|
| ABC National TV | CTAM | NHL |
| AccuWeather.com | Digital Broadcasting Group | Nielsen |
| Acxiom Corporation | Discovery Communications | OneScreen Inc. |
| ADITIVE | DraftFCB | PointRoll |
| AdMeld | Dynamic Logic, a Millward | Rovi Corporation |
| Adnetik | Brown Company | SAS Institute, Inc. |
| Adobe Systems | Ernst & Young LLP | Simulmedia |
| AdoTube | ESPN.com | Specific Media |
| Alcatel-Lucent | Federated Media Publishing | Synacor, Inc. |
| AMC Networks | FOX News Channel | TARGUSinfo |
| AT&T AdWorks | FreeWheel | Telemetry Limited |
| Auditude | Goldspot Media | The Allant Group |
| Base79 | Google | The Nielsen Company |
| BCM | HealthCentral | The Sales Athlete |
| Beliefnet, Inc. | HealthiNation | The Weather Channel |
| BlackArrow | Hulu | Time Inc. |
| Bloomberg L.P. | Innovid Inc. | Time Warner Cable |
| Brand Affinity Technologies | INVISION Inc. | Tremor Video |
| BrightLine | Kantar Media North America | Univision Interactive Media |
| Cable Television Laboratories | KPMG | USATODAY.com |
| Cablevision Advanced | Liquidus | Vevo |
| Systems | Lotame | VINDICO Group |
| Canoe Ventures, LLC | Medialets | WildTangent |
| Centro | Mediaplex | Yahoo! |
| Cisco Media Solutions Group | Mercury Radio Arts | YuMe |
| Collective | Microsoft Advertising | Zeta Interactive |
| Comcast Interactive Media | Millennial Media | Ziff Davis Enterprise |
| Comcast Spotlight | MTV Networks | |
| comScore | NBC Universal Digital Media | |
| Condé Nast | NCC Media | |



- **About the IAB**

The Interactive Advertising Bureau (IAB) is comprised of more than 500 leading media and technology companies that are responsible for selling 86% of online advertising in the United States. On behalf of its members, the IAB is dedicated to the growth of the interactive advertising marketplace, of interactive's share of total marketing spend, and of its members' share of total marketing spend. The IAB educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. Founded in 1996, the IAB is headquartered in New York City with a Public Policy office in Washington, D.C. For more information, please visit www.iab.net.

For more information on this report, or to join the IAB ITV Committee, please contact reports@iab.net or visit www.iab.net.

Appendix: Definitions and Nomenclature

Addressable Advertising: Getting the right advertising message to the right viewer at the right time.

Ad-ID -Ad-ID upgrades the previous ISCI commercial coding system and replaces other methods used to identify advertising assets. Ad-ID is the industry standard identifier for all forms of media. Developed by the American Association of Advertising Agencies (4A's) and the Association of National Advertisers, Inc. (ANA).

API (Application Programming Interface)

Bound Application: Applications (OCAP and MHP usually) which are associated with a particular TV channel (service). When the viewer changes channel, the application bound to the previous channel is terminated. (Source: Unisoft)

BNU – Branded Navigational Unit: This is a spot that appears during linear TV to promote ON DEMAND/VOD content.

CableCARD: Removable security card for digital cable terminals, as defined by the OpenCable project. (Source: Unisoft)

CableLabs: A non-profit research and development organization for cable operators in North and South America. CableLabs organizes member meetings and develops standards for all manner of cable equipment and software. (Source: ITVT)

Call-to-Action: A tactic used by the advertiser or marketer to drive the user to take an action. This may be toward the purchase of their product or towards the intended goal of the ad campaign (i.e. clicking on a link to go to the advertiser's micro-site)

Connected TV: Broadband-enabled TV, via either a set-top- box or built-in technology.

Conversion: A desired action attributed to the advertisement.

DBS (Direct Broadcast Satellite): Satellite broadcasts intended for home reception also referred to more broadly as direct-to-home signals.

DMA (Designated Market Area): Trademarked term for Nielsen Media Research Designated Television Market Area. Used by Nielsen Media Research to identify TV stations that best reach an area and attract the most viewers. There are 210 Nielsen DMAs in the United States and 56 metered markets.

DVR (Digital Video Recorder): a device that records video in a digital format to a disk drive or other memory medium within a device. The term includes stand-alone set-top boxes, portable media players (PMP) and software for personal computers which enables video capture and playback to and from disk.

EBIF (ETV Binary Interchange Format): Enhanced TV Binary Interchange Format – CableLabs Enhanced TV application and transport signaling specification. EBIF is an industry standard that defines the format used for transporting EBIF applications to a set-top. EBIF also defines how an EBIF user agent (UA) interprets, runs, and displays an EBIF application on a set-top. (Source: Canoe Ventures)

ETV: Enhanced Television, a specification by CableLabs which allows deployment of interactive content on "thin-clients" such as the Motorola DCT 2000 (with over 15M platforms deployed) and Scientific Atlanta Explorer 2000 as well as OpenCable (OCAP) host devices. (Source: Unisoft)

EPG (Electronic Program Guide): An application that allows the viewer to interactively select their television programming. The development of applications enhancing the EPG such as dynamic video selection, recording options, and more is a high growth area. Currently, the EPG allows the viewer to also access summaries of shows, the ability to set recording times, show program length and names of crew members, as well as the ability to select content via categories. More advanced EPG (also called Interactive Programming Guides -IPGs) applications enable the viewer to select shows to record over several weeks every time a show or a selected movie star appears on the schedule. Ultimately, EPGs will enable the TV set to learn the viewing habits of its user and suggest viewing schedules. (Source: ITVT)

Flash Downloading: The ability to automatically send software upgrades to a set-top box network. (Source: ITVT)

Headend: The control centre of a cable television system, where incoming signals are amplified, converted, processed, and combined into a common cable, along with any origination cable-casting, for transmission to the home. (Source: Unisoft)

Household (HH): A HH is defined as the subscriber and his/her co-habitants at a single physical address where video service is being delivered.

Host Device: Set-top-box or receiver containing and executing the OpenCable Application Platform implementation. It is also host to the CableCARD device.

Hotspot: Area of an ad that is clickable or is able to be interacted with.

Impression: A single instance of an online advertisement for the purposes of reporting and billing.

Invitation Unit: A smallish still or animated graphic often overlays directly onto video content. Typically used as a less-intrusive initial call-to-action. Normally when a viewer clicks or interacts with the invitation graphic, they expand into the ad's full expression, which might be a simple auto-play video or an interactive experience

IPG (Interactive Program Guide): a digital guide to scheduled broadcast television or radio programs, typically displayed on-screen with functions allowing a viewer to navigate, select, and discover content by time, title, channel, genre, etc. by use of their remote control, a keyboard, or other input devices such as a phone keypad.

IPTV: Generally, IPTV is a system that uses Internet protocols to render audio and video. The finer details can change depending on who's using the term. Web nerds who refer to IPTV are usually talking about Web video. In that case, IPTV is a synonym for broadband, streaming, and wireless video. (Source: OMMA)

iTV: Interactive TV usually means the viewer using the remote control to "interact" with the TV to change the available video, audio and any graphics in some way. These changes are typically made by an interactive software application running in the set-top-box or TV. (Source: Unisoft)

Java: Java is an object-oriented programming language originally developed by Sun Microsystems. Java applications can typically run on any Java Virtual Machine (JVM) regardless of computer architecture and is specifically designed to let application developers "write once, run anywhere".

Linear Ad: Conventional: 15, :30, or :30 video commercial spot. Linear refers to the fixed nature of the ad playback, which has a natural start, middle, and end which plays through without user interaction. (Source: Microsoft)

Linux: Multi-user operating system used by many OCAP receiver manufacturers to execute their OCAP middleware implementations.

Metadata: Refers to additional information about a creative asset other than the video itself. Includes things like creative description and AdID. Other logical objects can also have metadata, such as a stream, viewer, or content asset. (Source: Microsoft)

Middleware: In the context of interactive TV, the software which runs on a TV receiver which is layer between the operating system and the applications. Most middleware which are open standards are based on Java. (Source: Unisoft)

MSO: Multiple System Operator. A term for US cable companies that operate multiple cable systems. Time Warner Cable and Comcast are MSOs. (Source: Unisoft)

MVPD: Multichannel Video Programming Distributor. A service provider delivering video programming services, usually for a subscription fee (pay TV). These operators include cable television (CATV) systems, direct-broadcast satellite (DBS) providers, and wireline video providers, including Verizon FiOS and competitive local exchange carriers (CLECs) using IPTV.

Native Application: Typically an application which is written for the operating system of a receiver (set-top-box) rather than the middleware standard that may also be running on the receiver. ETV User Agents are implemented as native applications. (Source: Unisoft)

Non-Linear Ad: Unlike linear ads, non-linear are displayed concurrently with the content programming. Additionally, most non-linear ads carry an expectation of user interaction or some call-to-action. Examples of non-linear ads include lower-fifth overlays, and display ads surrounding the content i.e. in the channel guide. (Source: Microsoft)

Non-Overlay Non-Linear Ad: This specific type of non-linear ad type strictly does not overlay the video content. An example of non-overlay ads is a display ad surrounding the content i.e. in the channel guide. (Source: Microsoft)

OCAP: OpenCable Application Platform, the US cable industry's middleware standard specified by CableLabs. Also known as "tru2way". OCAP is Java based. (Source: Unisoft)

OpenCable: A project established by CableLabs, to standardize a cable network interface and to build a retail market for digital cable terminals. (Source: Unisoft)

Overlay Non-Linear Ad: This specific type of non-linear ad type may overlay the video content. An example of an overlay ad is a lower-third overlay. (Source: Microsoft)

Placement: Refers to the logical target that a creative may occupy in a specific media buy. For example, the bumper spot before the start of the 1pm "The Andy Griffith Show" from May 1st to May 5th. A placement specification may be more or less specific in terms of the targeted audience intended to reach. (Source: Microsoft)

Playlist: Refers in a technical sense to a logical stretch of video programming, with all the streams, clips, segments, and other events that are to occur in sequence for that programming. (Source: Microsoft)

Portal: Refers to a virtual destination where users can go to search for and consume content from multiple providers. Like MSOs, portals may share some of the ad insertion rights into the content with others in the ownership chain. (Source: Microsoft)

PVR (Personal Video Recorder): Also known as DVR. Device used by consumers, often provided by MSO to pause, rewind, and record video content for later playback. Many PVRs also have advanced content discovery functions such as scheduled recording and search by keyword. TiVo is a well-known brand of PVR. (Source: Microsoft)

Return Channel: A data path that goes from the subscriber to the cable headend. Also known as Upstream, Reverse Path or Return Path.

Set Top Box (STB): Refers to the device actually residing in the home that provides final content presentation and also facilitates individual user interaction with the programming. STBs perform functions such as descrambling, decoding, de-mixing of video signals; caching video content (i.e. PVR functions), sending uplink data from user interactions such as navigational actions; compositing display components such as channel guide, content streams, and ads together into a seamless full-screen experience. (Source: Microsoft)

Session: Refers to a viewing session. May be longer or shorter than the duration of a single show or episode. (Source: Microsoft)

Stream: Refers in a technical sense to the uninterrupted flow of video from a specific source that is delivered continuously in real-time to the user's display environment. A stream can be paused or jumped to different points in the timeline, depending on STB and headend capabilities. (Source: Microsoft)

Subscriber: Refers to the billable household customer about which certain demographic, psychographic, and technographic information is known by the local MSO, and which can be used for addressability purposes. (Source: Microsoft)

Telescoping: Refers to the navigational feature whereby a user can select or highlight a region of a video, still, or scene, and "drill down" for more information, or to open a new level of navigation for that selection. (Source: Microsoft)

Trick Mode - FF, RW, Pause: Refers to standard user playback actions coming from a viewer's remote control. (Source: Microsoft)

Tru2way: tru2way is the interactive TV standard for use cable systems. It replaces the term "OpenCable Platform" and is CableLabs' brand for the OCAP middleware standard. (Source: Unisoft)

Unbound Application: An OCAP application which is not bound to a particular cable network or service. It is present across all of the TV channels. (Source: Unisoft)

User Agent: Usually used in the context of ETV, a User Agent is native application which interprets EBIF binary code and renders images on the TV screen appropriately. (Source: Unisoft)

VOD (Video on Demand): A feature which allows TV viewers select (usually from the program guide) a movie or program to be played almost immediately. Usually VOD services are provided by VOD servers located in the cable company's headend. (Source: Unisoft)

W3C: W3C Consortium - An organization formed to develop common protocols to ensure interoperability and promote the World Wide Web. (Source: Unisoft)

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This document is also available online at www.iab.net/itv_overview. Feel free to download and distribute!

For comments or questions, please contact reports@iab.net.

Michael Theodore, VP, Member Services
(and the entire IAB Member Services Team)
michael@iab.net