



Accessibility Best Practices 1.0

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Introduction

The Need for Best Practices. The Accessibility Best Practices [ABP] process was launched by the Corporation for Public Broadcasting [CPB] in July 2007 as a direct response to research revealing the many obstacles that prevent viewers from finding public television programs when they're looking for something to watch during primetime.

With the proportion of digitally-equipped primetime television viewers at nearly two-thirds of the adult population and the interactive program guide [IPG] emerging as the primary navigation tool among a majority of consumers, the way that viewers find something to watch on TV has changed, while public television's way of telling people what it has to offer has not. The consequences for public television have been direct and dramatic. Viewers often report that they have not watched a particular PBS program or series, *not* because they dislike its content or format, but simply because they were *unaware* of it.

As more and more viewers make their decisions at the set, while surfing to specific digital tiers (rather than from bottom to top in unbroken numerical sequence), and navigating their options with the assistance of an IPG, our audiences need, as never before, to be empowered

The objective of these Accessibility Best Practices is, quite simply, to empower public television's audiences by making our primetime NPS content easier to find.

The benefits on the local level in making our primetime programs easier to find would include increased audiences for the National Program Service [NPS], expanded opportunities to build station membership from an expanded audience, and the operational efficiencies that can result from more clear and consistent procedures and technical operations.

The Process of Developing Best Practices. An interdisciplinary and cross-functional working group representing local stations, the national organizations, and producers has been studying the accessibility challenge and deliberating on alternative strategies since July 2007.¹ The Content Accessibility Working Group [CAWG] has had access to some of the best custom consumer research—both qualitative and quantitative—on the way digitally-equipped (cable, satellite, and telco) viewers navigate their choices.²

¹ This process has been led and funded by the Corporation for Public Broadcasting. The process has been facilitated by City Square Associates, Inc. Documentation of the meetings of the CAWG and summaries are available upon request from CPB.

² Research has included the tracking of technology penetration and program navigation information over five years through the CPB-funded Awareness, Attitudes, and Usage [AAU] studies fielded in 2004, 2006, and 2008; the Home Technology Monitor developed and maintained by Knowledge Networks/Statistical Research, Inc.; a quantitative re-contact survey specifically about the methods that viewers use to find primetime programs conducted in 2007; and a piece of ethnographic research fielded by Greenfield Consulting and commissioned specifically to help inform the development of these Best Practices. Summaries of the research findings are available upon request from CPB.

Members of the CAWG have looked closely at the procedures and technical operations and processes related to the transmission of program information—from the producer to the viewer’s set. And they have vetted their ideas at local stations, system gatherings, in open and widely-promoted web forums, as well as in structured and facilitated Web-based focus groups.³ The following is the beta version of the Accessibility Best Practices now being proposed to the public television System for acceptance and implementation. Most of these best practices require few if any additional resources at the local station level, though some may entail changes in local procedure or a redefinition of roles. Many of these Best Practices will require particular effort on the part of PBS and the producers of the programs that make up the primetime NPS. To that extent, they will require some additional investment of resources on the part of the System as a whole. But these investments of time, talent, and money are made in a well-founded conviction that viewers already predisposed to watch public television will be far more likely to do so—and to do so consistently— if the practical obstacles that get in their way can be removed. Likewise, *new* viewers might be more likely to *discover* the excellent content offered by their local public television stations, if we can make it easier for them to find our programs.

Guide to Reading the Document. This document begins by presenting the *evidence* that the working group considered when defining these Best Practices. It then defines the *general principles* and *specific actions* to be implemented in each of three areas specifically:

- 1. program titling and descriptions,**
- 2. promotional tools that can be used during the broadcast of a program, and**
- 3. the management and transmittal of program information.**

These areas are called out for special attention because they offer the best possibility of achieving the greatest impact in the shortest amount of time and at the most reasonable cost. Since the primetime NPS continues to account for the largest share of adult public television viewing at the majority of stations, the principles and practices outlined in this beta version apply to this part of a station’s schedule specifically. And since the use of new platforms (e.g., Web streaming, podcasting, etc.) to access NPS content, while growing, is still low in PTV’s target primetime audiences, the focus here is exclusively on television. Future editions may be expected to apply the principles of accessibility more widely—encompassing local productions and acquisitions, as well as new media platforms.

The last section of the document is devoted to what the CAWG has determined is necessary for effective implementation. Because of the degree of coordination required among various stakeholders, as well as the amount of work that remains to be carried out by designated Implementation Teams, these Best Practices assume the appointment and funding of an Accessibility Coordinator whose sole responsibility would be to foster the adoption of the principles and see to the implementation of the actions outlined herein.

³ Summaries of System Feedback obtained at the Fall 2007 PTPA meeting, January 2008 NETA conference, March 2008 Web Feedback Tool, April 2008 PBS Technology Conference and WebGroups can be obtained from CPB.

1. The Basis for the Best Practices

The Intersection of *the Desirable* and *the Possible*. From the start, the CAWG understood that, for Best Practices to achieve their aim, they would have to be built on a clear understanding of how digitally-equipped television viewers navigate the myriad viewing options available to them. The question, when looking at the consumer data available to us, is this: **In the best of all possible worlds, what would we do to make it easier for viewers to find our shows?**

But as experienced professionals in the public television System, CAWG members also understood that not everything that is desirable is equally important, and not everything that is important is equally possible. And so, the question when studying the journey of program information from producer to the viewer's set is this: **Given the way this particular system works and the resources available to change it, what *can* we do right now?**

Consumer Behavior - IPGs. The recent qualitative and quantitative viewer research reviewed by the CAWG makes it clear that digitally-equipped viewers—i.e., viewers who use digital cable, satellite, or telco reception—rely greatly on the text that appears both in their Interactive Program Guides [IPGs] and at the bottom of the screen when surfing, in order to make their viewing choices. It is also clear that—however important series, network, or station brands—viewers who use IPGs search *primarily* by subject matter and content.

In this context, and from a consumer standpoint, the titling and descriptions provided for public television programming in primetime are inconsistent in their clarity, utility, and appeal. Restrictions imposed by technology—e.g., the limited number of characters allowed for a program title in a scheduling grid—make lengthy compound program titles, or series titles followed by episode titles, virtually useless by clipping much of the verbiage a viewer would need to make sense of them. And even where titles are not too long, they are not always written with a view to stimulating the interest of the broadest possible audience. Complicating matters is the fact that inefficiencies in the way program data are transmitted (see “Information Management” below) make it all too common for a viewer either to find inaccurate program data in their IPG or no data at all.

The evidence strongly suggests that viewers will be more likely to find, sample, and watch public television's primetime offerings when the titles and descriptions they obtain through their cable, satellite, or telco system are *accurate, concise, and eye-catching*.

Consumer Behavior – Lower Thirds and On-air Promotion. In addition to what appears in their IPGs, and what they see during the breaks between programs, viewers are increasingly reliant on information that is provided *during the broadcast* of a show—either in the text and images that can be displayed in the lower third of the screen or through embedded promotions that appear near, but not at the very end, of a program.

Whether to tell them what they're currently watching, or the channel to which their set is currently tuned, or else to remind them of what's “up next” or what's “next on,” these have become an industry standard to help viewers orient themselves in a cluttered viewing landscape and to entice viewers of *one* program to *another* program for which there is reason to believe they will have a desire or appetite to watch.

It is true that viewers occasionally grumble about the messages and bugs that appear in the lower third of the screen. **But there is also evidence that viewers have become accustomed to the use of these devices and even disposed to welcome them when they're providing information the viewer is looking for, in a manner that is not annoying or obnoxious.**

And while viewers sometimes object to commercial interruptions, **viewers think of program promotion in general—and embedded promotions specifically—as *distinct* from advertising: a *service* rather than an annoyance, useful information that they can use to plan their viewing.**

Information Management. In addition to studying relevant consumer behavior and attitudes, we studied our own behavior as a System that generates, distributes, and promotes content. Although, on both a local and national level, PTV personnel report inconsistencies and frustrations in dealing with the main listing services, the origin of many of the problems that manifest themselves on the viewer's screen lies *within* rather than *outside* of the public television System.

For example, the current path by which program information travels from producer to the viewer's set involves a multitude of players, both on the national and local level, and in organizations both within and outside of the public television system. A careful business process analysis revealed that, in this current system, the likelihood of inconsistent or erroneous listings (or no listing at all!) appearing on the viewer's set is greater than is acceptable.

As many as three distinct databases are involved in the collection, management, and transmission of program information—and that's just within the public television system. What happens when program information is transmitted to the listing services—from either PBS or local stations—greatly increases the likelihood of viewer-facing error, and there is evidence to suggest that this is causing viewers to gravitate toward other more reliable options.

It is clear, then, that a comprehensive approach to Accessibility addresses not only what appears on viewers' screens, but also the systems and procedures by which the program information and promotional content are passed through the System. Although many dedicated professionals have been working independently and without fanfare to address particular aspects of this situation, a concerted effort and additional resources will be required to develop solutions that can be widely implemented.

2. The Best Practices

a) Program Titling and Descriptions

Principles

- i. Titles and descriptions that are created and submitted for eventual on-screen use will be, going forward, consistently written with the prospective viewer in mind. This means that, whatever titles or descriptions may be in use in the early stages of a particular program or series, those titles and descriptions which are entered into the databases which feed ProTrack, or from which information is provided to the main listing services (TV Guide and Tribune) will need to be framed (or re-framed) primarily for the benefit of the viewer who will use the information to make a viewing decision.
- ii. Titles henceforth are to be composed in such a way as to pass “the 26-character test.” That is, if a program title cannot be deemed intelligible and appealing in 26 letters or fewer,⁴ it will be considered unacceptable and need to be rewritten. Except in compelling cases, the communication hierarchy for titles should be subject matter first, and series brand second.⁵ Ample opportunities exist for a series to define and reinforce its brand *during* the broadcast; the purpose of the title in the IPG is to make the content of the program offering instantaneously clear and compelling.
- iii. Descriptions are to be composed by producers, producing stations, and their publicists in varying lengths to accommodate the different ways in which they will appear on-screen. In every case, the priority will be the stimulation of viewer interest, rather than the conveying of a blandly factual and comprehensive synopsis of the episode. The use of this same descriptive information in other media—local station program guides, websites, and newspapers should also be considered in the development of norms for descriptions.

Actions

- i. A “Titling and Description Implementation Team” consisting of representatives of the CAWG as well as program producers and promotion staff will develop simple, clear rules for NPS primetime program titling and descriptions. These will be incorporated into an updated PBS Redbook and be considered among the conditions for broadcast. They are to be published Systemwide in trenches-ready or “Pocket Guide” format.
- ii. PBS will appoint a “Title and Description Coach” whose responsibility it will be to work closely with NPS producers to refine titles and descriptions for maximum impact and appeal. The “Coach” will collaborate with PBS Research to develop a simple, cost-effective way of running title-tests to insure that PBS primetime titles are consistently consumer-facing.
- iii. Summits with senior executives at the main national listing services—TV Guide and Tribune—will be held to determine in advance what would be mutually beneficial and to establish what is realistic and possible so that the guidelines described above can ultimately impact what viewers see on their TV screens, find on the Web, or read in the paper. Depending on the outcome of these summits, a “local station tool kit” will be developed to include both the “Pocket Guide” referenced above and specific guidance on how to get the most out of the relationship with one’s listing services.

⁴ The precise number of characters may vary by listing service or set-top box interface. Part of the work of the Implementation Team will be to establish the exact number required to apply to the majority of households nationwide.

⁵ The Implementation team will work with TV Guide, Tribune Media, TiVo and others to enlist their support of this titling convention.

b) Promotional Tools During the Broadcast: Embedded Promos and Use of Lower Thirds

Principles

- i. Public television will make the fullest possible use of the lower third of the screen during program broadcast that is, at the same time, consistent with its distinctiveness as a non-commercial program service that permits viewers to enjoy an uncluttered viewing experience. The main strategic uses of lower thirds will be to deliver valuable program information (next-ups and next-ons), to reinforce local station identities, and to cultivate series brands. In their quantity, content, and design, these images and messages must both be effective as marketing tools and consistent with public television's reputation as a platform in which high quality content can be enjoyed with a minimum of clutter and distraction.
- ii. The practice of embedded promotion, already well underway, is to be extended and supported across the primetime NPS schedule. The embedded promotion platform is to be thought of as a place from which a series can promote upcoming episodes, or swap cross-promotional messages with affinity series, or a local station can feature a particular local programming event. Particularly in a service like the primetime NPS, with its non-uniform schedule, the more routine and effective use of both embedded promotion and lower third messaging is critical in the effort to retain and build viewership.
- iii. In the case of both embedded promotion and lower thirds, producers are to be empowered with the information they need to make sound decisions about where, when, and how the promotional content is to be inserted so that the integrity of their art is not violated. Local stations are to be given accurate information in a timely fashion by producers so that promotional material can be appropriately inserted, as well as operational flexibility to adapt to local circumstances and retain opportunities for local differentiation.

Actions

- i. A "Promotion Implementation Team" consisting of CAWG members and representatives of the technical, producing, programming, and marketing disciplines will be convened to formulate a technical and style guide to govern the design and use of lower thirds. Like the titling and description rules, these are to be incorporated into the PBS Redbook and made conditions of distribution. At the outset of implementation, pilot markets and/or pilot series will be identified for tests of specific tactics and approaches. Data will be gathered to gauge the impact of these alternative approaches.
- ii. PBS will continue to support and extend the use of embedded promotion. They will begin by updating the existing research that speaks to the effectiveness of embedded promotion, and then—as appropriate—communicating the measurable benefits of embedded promotion more clearly and widely throughout the System. PBS will develop specific incentives to producers in order to encourage wider and more consistent adoption across the primetime NPS.
- iii. Going forward, producers will commit themselves to timely delivery of embedded promotion content as well as time code based insertion points for lower third promotion. Technical personnel at local stations will be provided sufficient information and training to implement both practices effectively and efficiently.

c) The Management of Program Information

Principles

- i. A reasonable consistency in the data formats, fields, and parameters for public television databases containing program information will be more conducive to timely, accurate sharing and transmission of the data that ultimately appears on viewers' sets. For the purposes of this principle, "public television databases" include PBS Orion and Broadview, ProTrack, as well as proprietary local station reports and forms. The specifications to be used in achieving this consistency must take account of the requirements of the main listing services, as well as of the major cable, satellite, and telco operators (e.g., IPG restrictions, limitations, and maximums) if they are to achieve their aim of facilitating timely and accurate data transmission.
- ii. To the extent possible, procedures should be simplified and streamlined so that program information is touched only by as many hands as is absolutely necessary, eliminating inefficiency, duplication, and multiple opportunities for error.
- iii. The success of these efforts depends on getting the most complete and accurate program information as early as possible in the process—beginning with producers, producing stations, and their publicists—so as to minimize the necessity of making last-minute changes in title, content, program length, or other relevant variables.

Actions

- i. A "Data Management Implementation Team" consisting of representatives from the CAWG as well as PBS and local traffic, engineering, and programming professionals will work closely and directly with the team defining the title and description rules, in order to align database design and management procedures with the standards set for program titles and descriptions. Their work will begin with Orion and then extend to traffic software vendors to alter databases so that the changes implemented will filter unimpeded throughout the System.
- ii. Since the information to be entered into the data stream described above originates with producers, the Implementation Team will work closely with producers to renovate the procedures for creating, entering, and revising essential program information. Renovated procedures will take account of both long-lead planning *and* the special circumstance of news and public affairs program whose content and talent may not be determined until a time close to broadcast. And, for the purposes of accessibility, "essential program information" will include program title, description, rating, genre, and captioning status—provision of which will be considered a condition of distribution.
- iii. Training and support will be provided to producers and others in transitioning to these new data formats and procedures, monitoring their impact, and modifying them where necessary on the basis of experience.

3. Implementation and Leadership

In the process of developing these Best Practices, the CAWG uncovered a widespread sentiment in the public television community that numerous similar efforts have gone aground in the past. Groups have met and talked for months, only to find that they needed to convene yet another group. Or else a set of guidelines or a report was issued to little or no effect. We are determined this initiative will not follow that pattern.

But the complexity of the task and the number of players in a fundamentally decentralized System means that the only way to achieve success is to build-in effective coordination and empowered leadership from the start. The reality is that no one currently—at either the national or local level—has room in his/her portfolio or the available bandwidth necessary to take on the leadership and coordination job.

The implementation of these Best Practices—as well as the development of future ones in response to changes in the environment or what is learned from the many controlled experiments—needs to be *owned*. In other words, *someone* needs to be empowered and recognized by the System as appropriate to lead this initiative.

A Primetime Content Accessibility Coordinator should be appointed and empowered to work with PBS and NPS producers, representatives of the main listing services, as well as local programmers, engineers, marketers, and traffic personnel to implement these Best Practices, monitor and measure their effectiveness, and propose adaptations and additions to keep pace with changes in technology and the viewing landscape.

Without such a person—or someone or something serving such a person’s function—it is unlikely that the principles and actions described herein can be widely embraced or effectively sustained. Sufficient resources—at least enough to fund a 2-3-year contract and administrative support—need to be assigned to the task, so that what has been an afterthought up until now becomes a priority sustained long enough to measure its impact.

A Final Word

As a *beta* version, it should be clear that these Accessibility Best Practices are dynamic and, in principle, open to evolution and refinement on the basis of what is learned from implementation and change that will inevitably continue to occur in the television landscape. Continual and close monitoring and measurement of the impact of changes outlined here will be essential. And it is expected that updates, add-ons, and amendments will be made to these Best Practices over the course of the coming years.

The hope is that most of what is proposed here will succeed in its objectives. The likelihood is great that some individual elements will miss their mark or require retuning. But the only way we will find out is to try. Given the continued erosion of our audiences in spite of the high quality of our content, the risks entailed in *not trying* to meet the challenges of the digital television age are far greater than any minor hazard associated with the implementation of the ideas presented here.