

# New Roads, New Directions, New Markets

The changing Australian media landscape  
and emerging types of content

Gary Hayes, Director LAMP and  
former Senior Producer & Development Manager BBCi 95-04



“Over a 15 year, medium term broadband future terms such as Film, TV, Radio & the Internet will start to disappear from our next generation’s vocabulary. Audiences will interactively share & access video, audio and games across a sea of devices, partly oblivious of appointment-to-view in the 20th Century.”

Gary Hayes - Snr Producer, BBC. Small Screen Big Picture, Nov 2000, Perth

“And we will arrive at a digital Britain not when we switch analog terrestrial TV to digital but when every household has access to rich and interactive on-demand services? ... We believe that **on-demand changes the terms of the debate**, indeed that it will change what we mean by the word 'broadcasting'.”

Mark Thompson - Director General BBC, Sep 2005. Edinburgh



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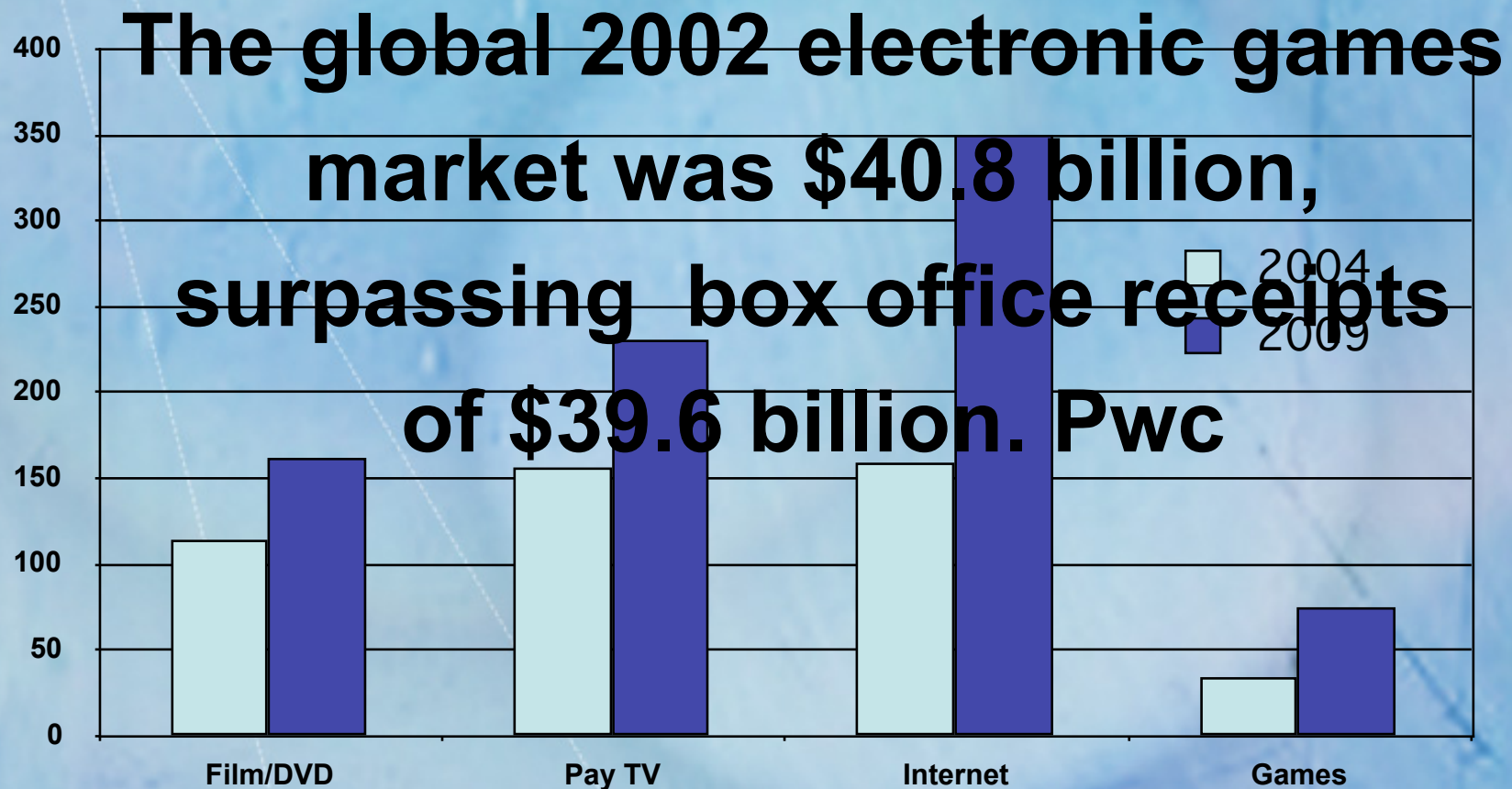
**NEW ROADS**

major partner  **South Australian  
Film Corporation**

The future is here.  
It's just not widely distributed yet.  
**William Gibson**



Worldwide consumer spending A\$bill 2004-2009. Pwc 2005



So where are the new markets?







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## NEW ROADS

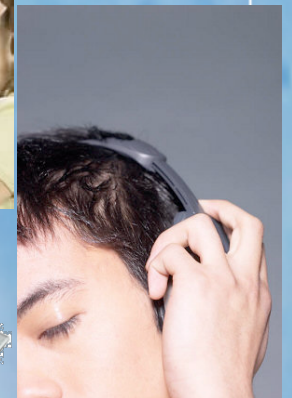
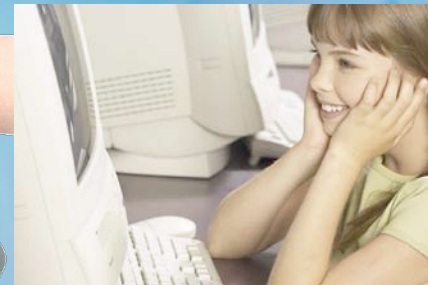
major partner  South Australian Film Corporation

- Between 1993 to 2003 Australian home produced drama and comedy have fallen by over **50%** yet it has imported nearly **60%** more foreign TV – AFC May 05
- Broadband adoption in Australia is **more than double that from this time last year**. KPMG predicts exports raised by **\$400mill** pa over next decade
- IDC predicts that the online music market in Australia will grow 43 TIMES from \$1.2mill to \$52mill in 2009
- In the UK the BBC predicts broadband to 20 million homes (83%) by 2016 and seven in ten homes will be able to schedule their viewing and listening at a time that suits them best – PVR & broadband

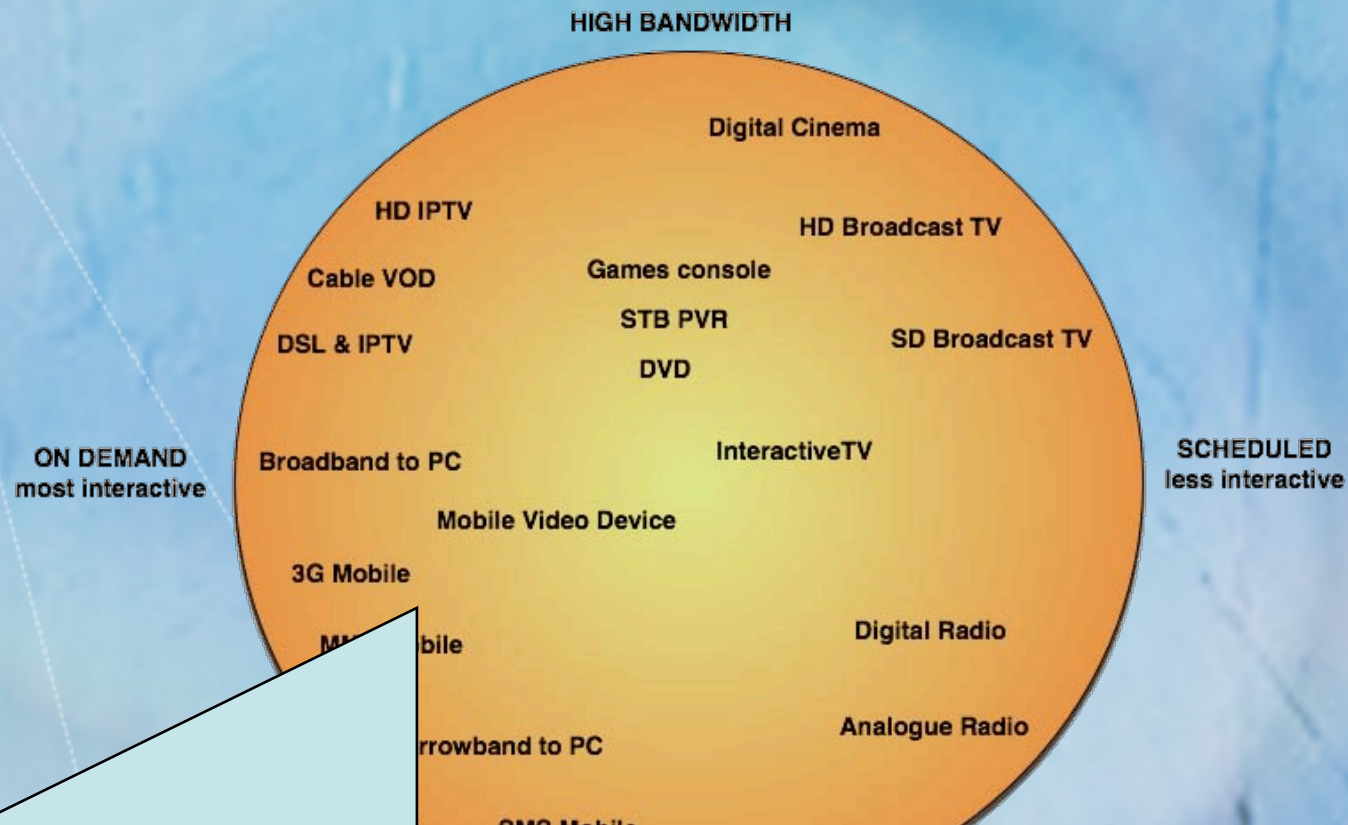
CONTROL & CHOICE  
with audience

Viewers this way

CONTROL & CHOICE  
with broadcaster &  
traditional distribution



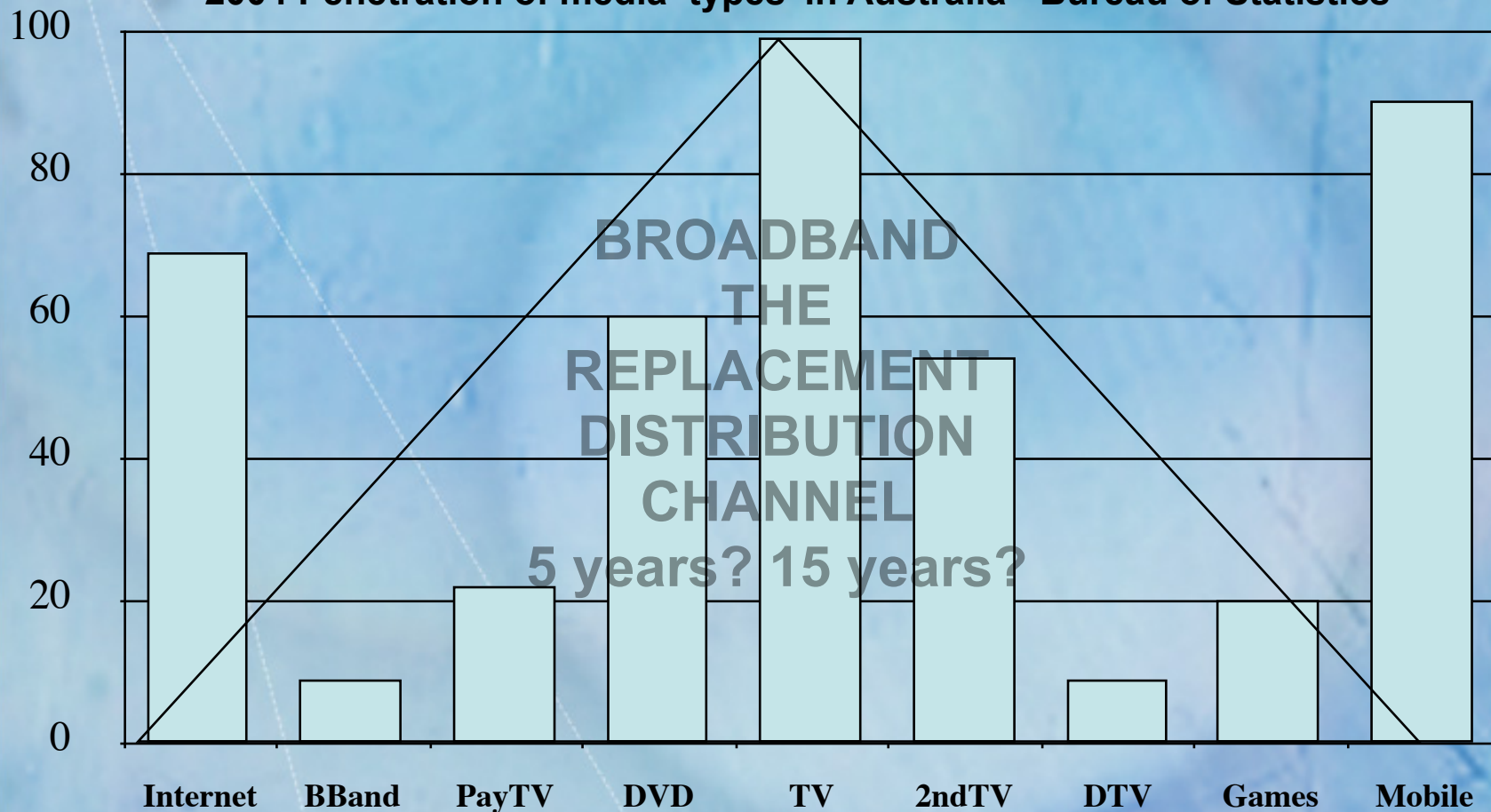




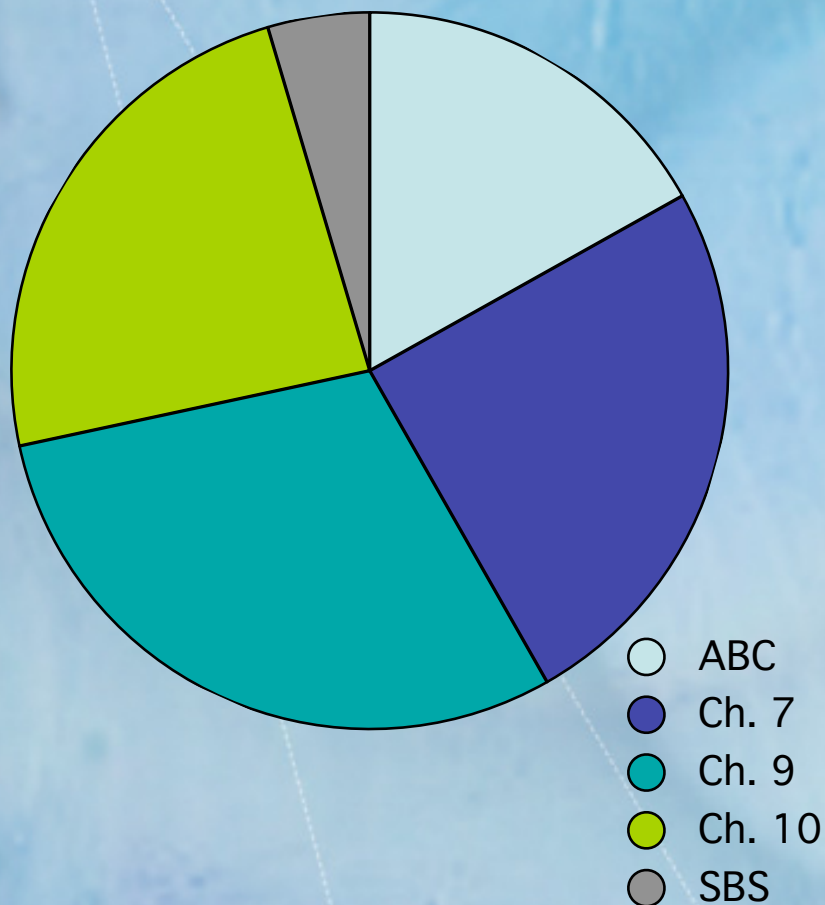
**CONSUMERS MOVING FROM  
SCHEDULED TO ON-DEMAND**



2004 Penetration of media 'types' in Australia - Bureau of Statistics



### Share of audience - free to air TV in Australia



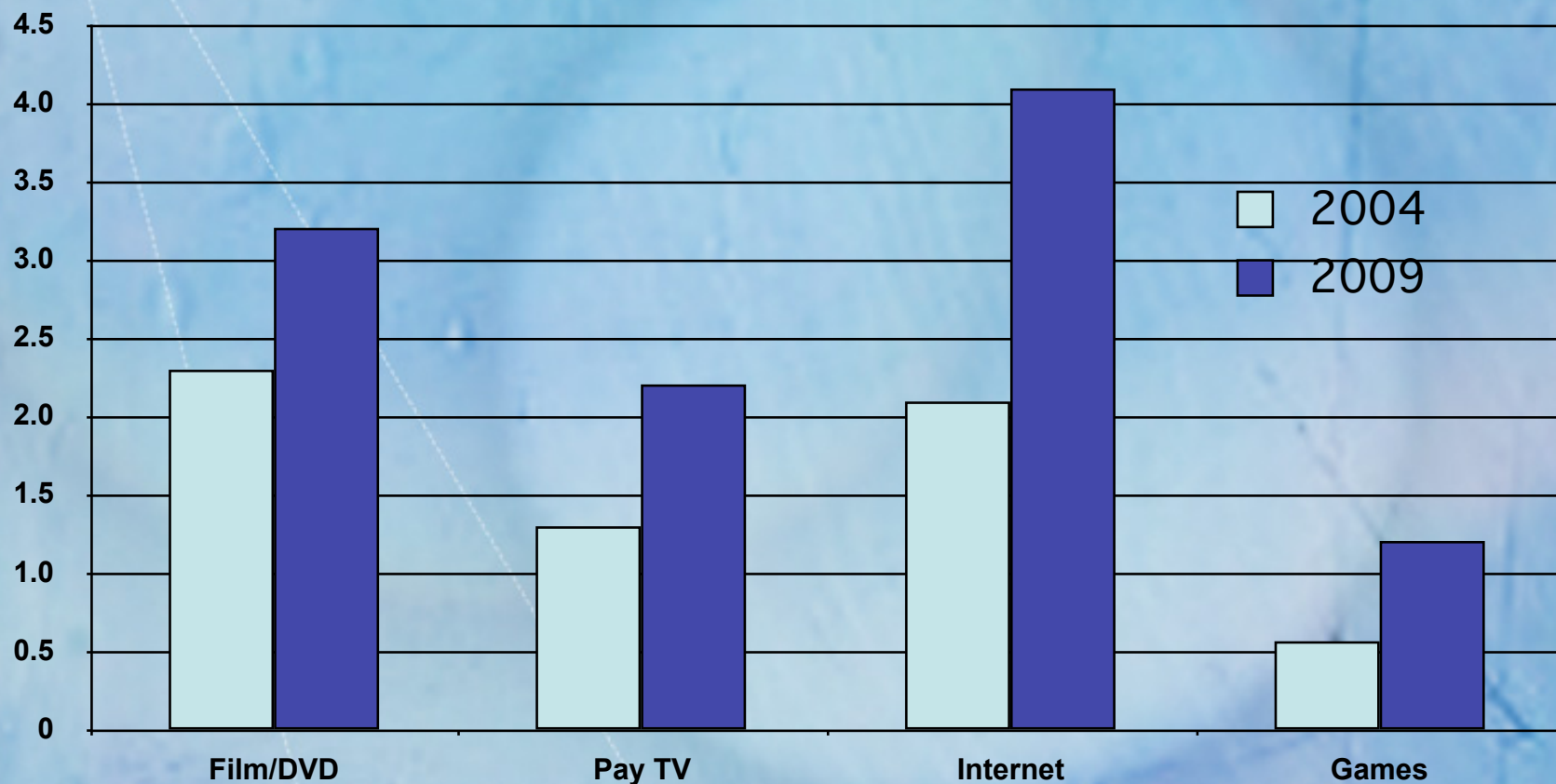
but...

- **Australians** with broadband spend around 23 hrs a week consuming media – **more time than 13-39 year olds spend watching TV!** Ericsson/AFR Nov 04
- In the US people spend 34% of their media consumption time on the internet – **more time than TV!**

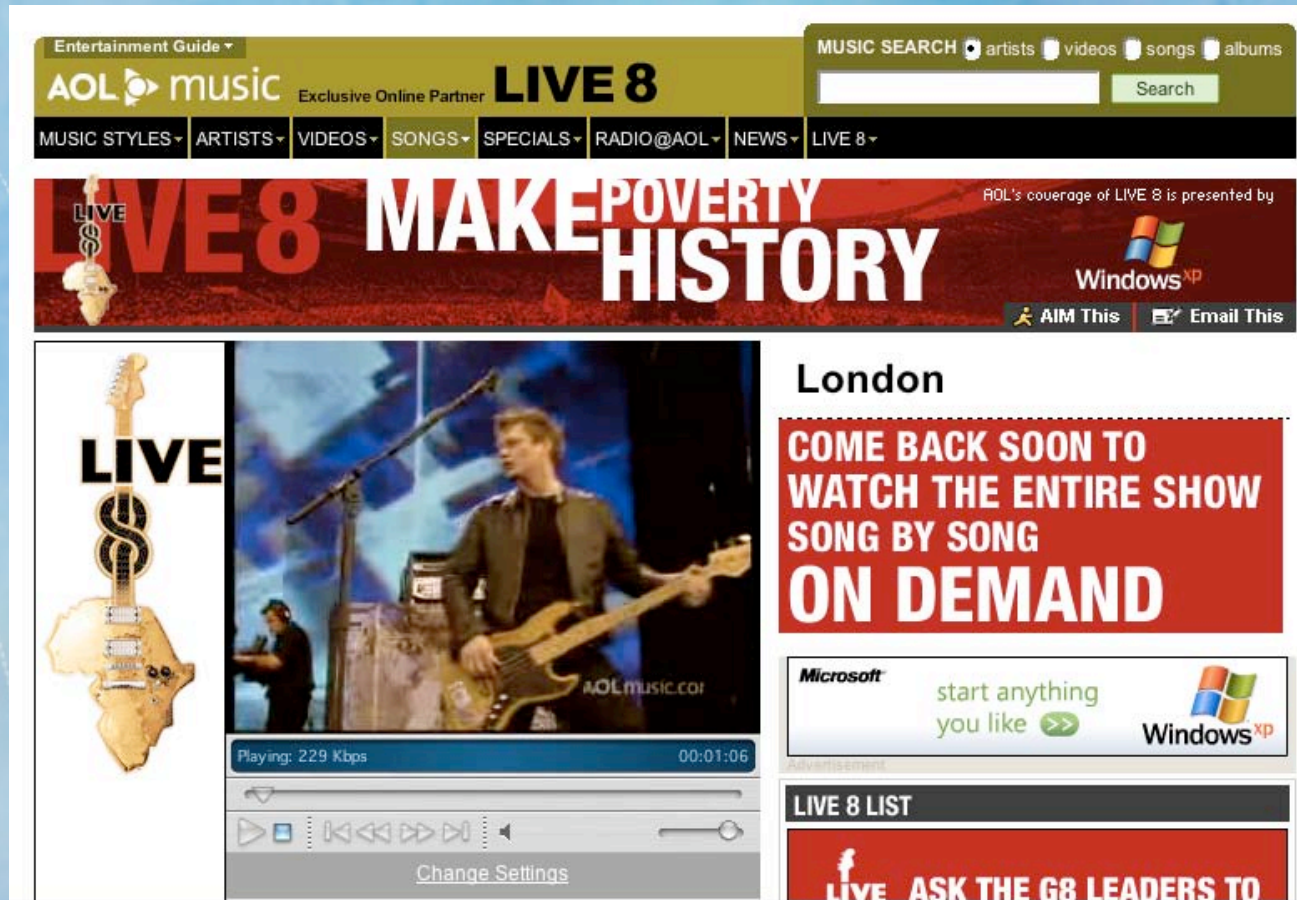


## Australian consumer spending A\$bill 2004-2009. PW2005

Note: Consumer spending on internet & games will be bigger than paytv, film & dvd combined in next five years!



## Broadband will be...



The screenshot shows the AOL Music Live 8 website interface. At the top, there's a navigation bar with "Entertainment Guide" and "MUSIC SEARCH" for artists, videos, songs, and albums. The main header features "AOL music" and "LIVE 8" with "Exclusive Online Partner" text. Below this is a menu with categories like MUSIC STYLES, ARTISTS, VIDEOS, SONGS, SPECIALS, RADIO@AOL, NEWS, and LIVE 8. A large banner reads "LIVE 8 MAKE POVERTY HISTORY" with a small map of Australia and the text "AOL's coverage of LIVE 8 is presented by Windows XP". Below the banner, there's a video player showing a musician performing. To the left of the player is a guitar graphic with "LIVE 8" text. To the right, a red box says "COME BACK SOON TO WATCH THE ENTIRE SHOW SONG BY SONG ON DEMAND". Below the video player, there's a "LIVE 8 LIST" section and a red box with "LIVE ASK THE G8 LEADERS TO".



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...the new TV, of course





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What else happens as consumers move over to always on,  
connected broadband?



They become content providers and share!



The screenshot shows a video blog interface. On the left is a vertical list of video thumbnails with titles and metadata. On the right is a video player showing a video by Marc Canter, with a description and social media links below it.

Thumbnail	Title	Format	Duration	Size
	<a href="#">scratch video</a>	Quicktime	1.2 min	4.3 MB
	<a href="#">CheekyFish</a>	Quicktime	0.7 min	2.6 MB
	<a href="#">Summer Taste</a>	Quicktime	1.1 min	4.5 MB
	<a href="#">synthetics</a>	Quicktime	0.3 min	0.3 MB
	<a href="#">the edit</a>	Quicktime	0.5 min	0.5 MB
	<a href="#">clean doors</a>	Quicktime	1.3 min	4.4 MB
	<a href="#">rainy day</a>	Quicktime	0.3 min	0.3 MB

Help me out, [vote for Mefedia at the Businessweek poll](#).  
It's a big deal and I'd really (no, really!) appreciate it if you'd vote.  
Please? [Vote here](#)

**Marc Canter**

TAG THIS BLOG THIS LEAVE A COMMENT MAKE A QUOTE

**VIDEO: Marc Canter explains OurMedia till now**  
I went to Blogger this weekend with Ryan. Saw Marc Canter and asked him about OurMedia and the Internet Archive. It's been slow and slightly screwy lately. So here's a video of our info exchange. For those of you who don't know, Marc Canter and JD Lasica started Ourmedia.org in January. They got in running in April(?)....and have helped the Videoblogging Community bootstrap itself into existence by offering free hosting of our videos through the Internet Archive. Ourmedia has gone through a lot of growing pains in the last 4 months. Google, slow downloads, missing media, etc. But it's getting better.

# They become content providers and share!

## Vimeo is for *sharing your video clips*.

Vimeo is the easiest way to share your video clips. You can [create an account](#) for free in a few seconds and upload any video format you'd like (.ogg, .wmv, .mov, etc). We also have tagging, comments, and a bunch of new features in development!

**BusinessWeek** has a poll for the Best of the Web. Please [vote for Vimeo](#) in their Home Video category!

If you were in charge of Vimeo, what would you change? [vimeo.feedback@gmail.com](mailto:vimeo.feedback@gmail.com).

Mac users: check out [PictureSync](#) for easier uploading and encoding of videos. Works great with Vimeo, [Flickr](#), and other media sharing sites!

### Popular clips - yesterday



The sideways couch suplex



The start of "The Meat Fight"



Camera man in harms way

### Popular clips - two days ago



### People with popular clips yesterday:



virgorama



stringbeanjean



saltedwound



corinski



7how7



amistar



sagelet



Nikki

### New users:

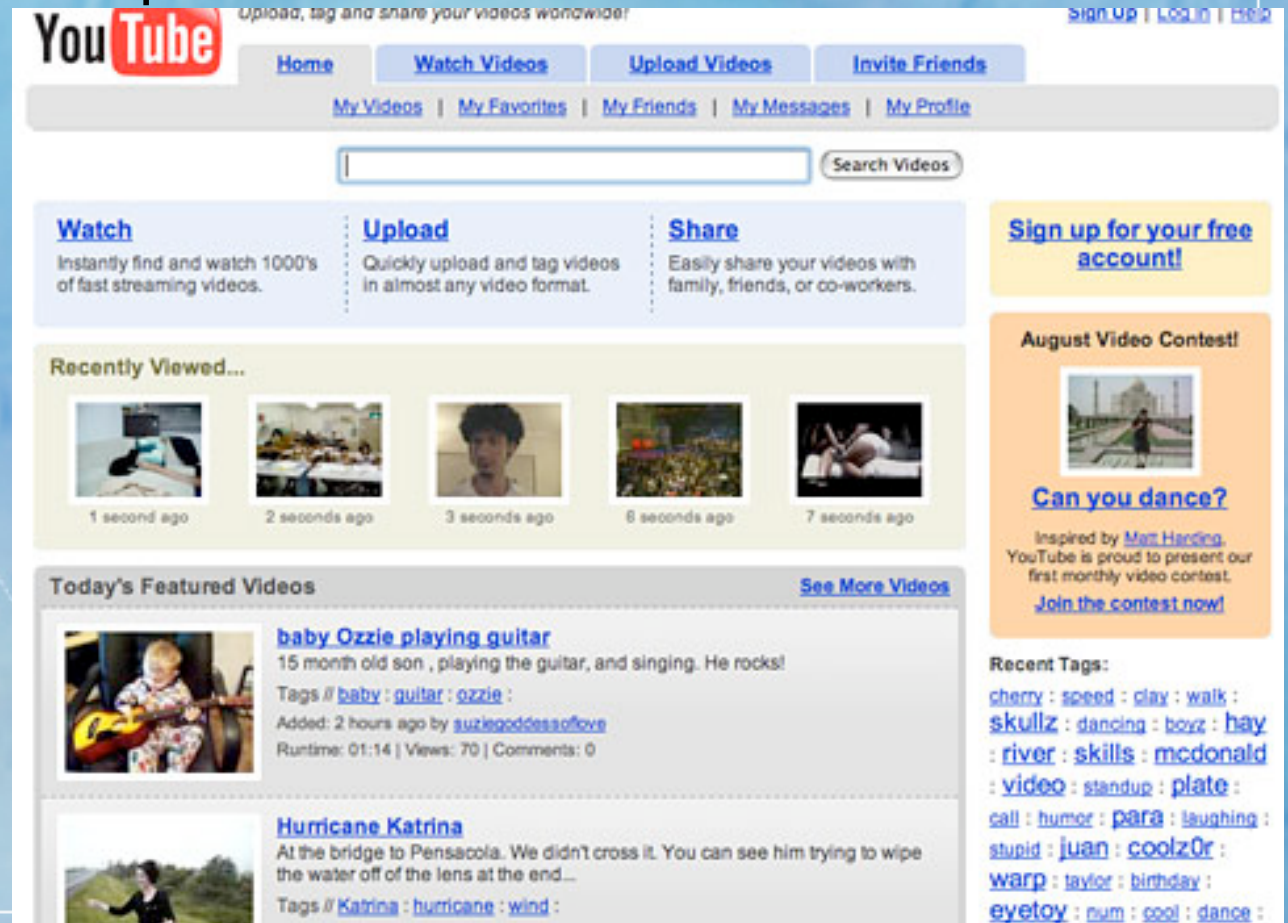


slpcourtney





They become content providers and share!



The screenshot shows the YouTube homepage with the following elements:

- Header:** YouTube logo, navigation links (Home, Watch Videos, Upload Videos, Invite Friends), and user links (My Videos, My Favorites, My Friends, My Messages, My Profile).
- Search:** A search bar with the placeholder text "Search Videos".
- Watch:** "Instantly find and watch 1000's of fast streaming videos."
- Upload:** "Quickly upload and tag videos in almost any video format."
- Share:** "Easily share your videos with family, friends, or co-workers."
- Recently Viewed...**: A row of five video thumbnails with timestamps: "1 second ago", "2 seconds ago", "3 seconds ago", "6 seconds ago", and "7 seconds ago".
- Today's Featured Videos:**
  - Video 1:** "baby Ozzie playing guitar" (15 month old son, playing the guitar, and singing. He rocks!). Tags: baby, guitar, ozzie. Added: 2 hours ago by suzlegoddesoffova. Runtime: 01:14 | Views: 70 | Comments: 0.
  - Video 2:** "Hurricane Katrina" (At the bridge to Pensacola. We didn't cross it. You can see him trying to wipe the water off of the lens at the end...). Tags: Katrina, hurricane, wind.
- Right Sidebar:**
  - Sign up for your free account!**
  - August Video Contest!** (Inspired by Matt Harding. YouTube is proud to present our first monthly video contest. Join the contest now!)
  - Recent Tags:** cherry, speed, play, walk, skullz, dancing, bozz, hay, river, skills, mcdonald, video, standup, plate, call, humor, para, laughing, stupid, juan, coolz0r, warp, taylor, birthday, eyetoy, num, cool, dance.

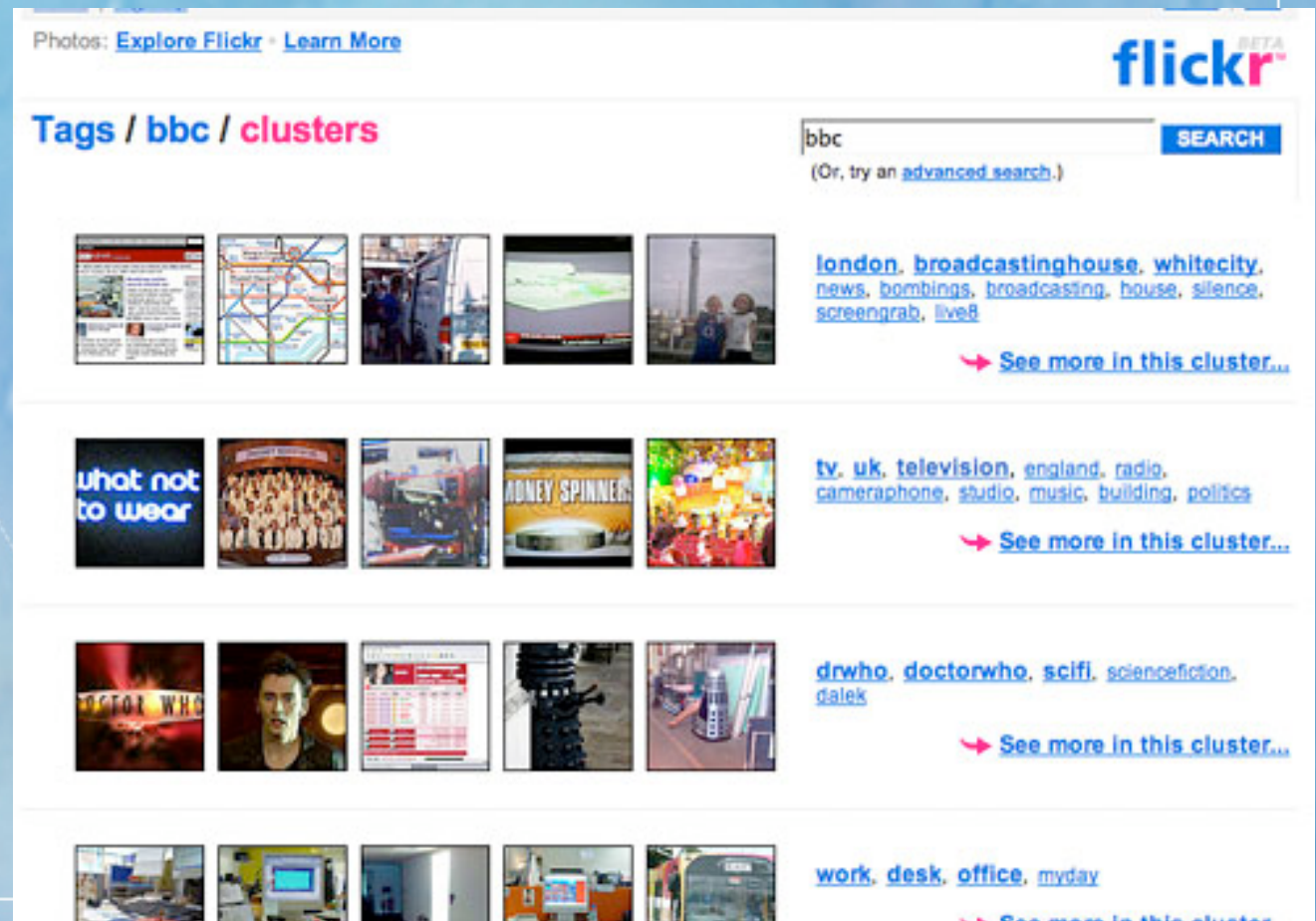
They become content providers and share!



The screenshot shows the Grouper website homepage. At the top is the Grouper logo and the tagline "Isn't Your Life Worth Sharing?". Below this is a navigation bar with links: Home, What is Grouper?, Download, Directory, Support, Forums, About, Blogs. The main content area is divided into two columns. The left column has a blue background and contains the text: "Grouper Gets It", "The perfect way to share your personal media.", "Let loose your creations. Art, poetry, film...share what is yours.", "Be social. Meet like-minded individuals and join their groups.", and "100,000 groups...and growing 180 million files shared between friends". The right column has a blue background and contains the text: "Grouper has been nominated BusinessWeek online VOTE NOW! Best Way For Sharing Video" and a link "Click here to cast your vote". Below this is a section titled "Today's Featured Group" with a thumbnail for "Skater Paradise" and details: "Created: 8/27/2005 10:28:26 PM", "2 Members", "Created By: wikkid1", "Category: Sports and Rec | Extreme Sports", "Groups For Skaters to share...", and links "More Info" and "Request Invite". To the right of this section is a yellow box with the text "Version 1.6 Now Available!", a "Download Now" button, and the text "Grab Some Groupies!". At the bottom right, there is a small section titled "Likes: Guys who use Grouper" with a list of names.



They become content providers and share!





They become content providers and share!

## Steve Garfield's Video Blog

### The Carol and Steve Show - Episode 35: The Rolling Stones at Fenway Park

Carol and Steve head down to Fenway Park in Boston to hear the Rolling Stones who were on the first stop of their 2005 US Tour.



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Your wish is on demand

Steve Garfield  
Now Playing On  
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[www.akimbo.com](http://www.akimbo.com)

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**3 MONTHS FREE AKIMBO SERVICE**  
**+ 30 DAYS RISK FREE** Money Back Guarantee

Requires monthly service fee

**What is Akimbo?**  
Watch digital quality videos on your TV delivered over your broadband internet connection.

**What's On**  
Over 3,000 programs available whenever you want: Movies, Sports, Anime, Independent Films, Music Videos and more. Explore programs from a broad spectrum of partners like A&E, iFilm, BBC, How To Web TV, National Geographic, Underground Film and The History Channel—and many more.

**Buy Akimbo!**  
Enjoy what you want, when you want and with total control.

**Download Video to Your TV with Akimbo**

				<a href="#">Many More</a>		

**CLICK HERE TO WIN A FREE AKIMBO PLAYER!**





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## NEW ROADS

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Significant technology enablers for content producers 12-18 months

- **Broadband** - iVideo distribution globally - Broadband portals & IPTV
- **Digital TV & PVR** - transition, new form interactivity and monetisation
- **Portable devices** - video (PSP, iPodVideo, 3G phones etc)
- Video and game **convergent devices** - PS3, XBox360
- Tools for **online promotion** - simple, easy to distribute



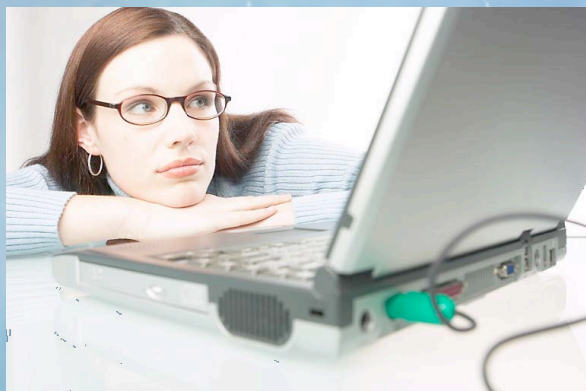
## **ALL NEW IDEAS PASS THROUGH THREE STAGES...**

**First, they are ridiculed**

**Second, they are violently opposed**

**Third, they are accepted as being self-evident**

Schopenhauer (miss quote)



## There is demand for advanced TV content - BBC iTV in 2004! More penetration than online, at the moment

- |  |  |  |
|--|--|--|
| <p>1<sup>st</sup> Jan, <b>The Sound Of Music</b>, BBC ONE<br/>         11<sup>th</sup> Jan, <b>This World</b>, BBC TWO<br/>         24<sup>th</sup> Jan, <b>Perou's Africa</b>, BBC THREE<br/>         28<sup>th</sup> Jan, <b>Hey Big Spender!</b>, BBC ONE<br/>         29<sup>th</sup> Jan, <b>11 Plus</b>, BBC ONE (NI)<br/>         30<sup>th</sup> Jan, <b>Dunkirk Countdown</b>, BBC ONE &amp; BBC TWO<br/>         1<sup>st</sup> Feb, <b>Politics Show</b>, BBC ONE<br/>         14<sup>th</sup> Feb, <b>Six Nations</b>, BBC ONE &amp; BBC TWO<br/>         15<sup>th</sup> Feb, <b>Taking Care</b>, BBC ONE &amp; BBC TWO<br/>         18<sup>th</sup> Feb, <b>Dunkirk Eyewitness</b>, BBC TWO<br/>         27<sup>th</sup> Feb, <b>XChange</b>, CBBC<br/>         27<sup>th</sup> Feb, <b>Celtic Connections</b>, BBC FOUR<br/>         28<sup>th</sup> Feb, <b>Making Your Mind Up</b>, BBC ONE<br/>         29<sup>th</sup> Feb, <b>Catterick Songs</b>, BBC THREE<br/>         7<sup>th</sup> March, <b>Panorama</b>, BBC ONE<br/>         17<sup>th</sup> March, <b>Northern Ireland Audio</b>, BBC ONE (NI)<br/>         19<sup>th</sup> March, <b>Mozart i</b>, BBC TWO &amp; BBC FOUR<br/>         29<sup>th</sup> March, <b>Vic's Chicks</b>, BBC THREE<br/>         3<sup>rd</sup> April, <b>Come And Have A Go</b>, BBC ONE<br/>         17<sup>th</sup> April, <b>Snooker</b>, BBC ONE &amp; BBC TWO<br/>         18<sup>th</sup> April, <b>Marathon</b>, BBC ONE &amp; BBC TWO<br/>         1<sup>st</sup> May, <b>Test Your Pet</b>, BBC ONE<br/>         4<sup>th</sup> May, <b>Brassed Off Britain</b>, BBC ONE<br/>         8<sup>th</sup> May, <b>Old Firm</b>, BBC ONE</p> | <p>15<sup>th</sup> May, <b>Eurovision!</b>, BBCONE &amp; BBC THREE<br/>         22<sup>nd</sup> May, <b>TTN IQ</b>, BBC ONE<br/>         23<sup>rd</sup> May, <b>Chelsea Flower Show</b>, BBC ONE &amp; BBC TWO<br/>         29<sup>th</sup> May, <b>D-Day</b>, BBC ONE &amp; BBC TWO<br/>         4<sup>th</sup> June, <b>French Open Tennis</b>, BBC ONE<br/>         12<sup>th</sup> June, <b>Euro 2004</b>, BBC ONE<br/>         13<sup>th</sup> June, <b>Euro Goals</b>, BBC ONE<br/>         21<sup>st</sup> June, <b>Wimbledon</b>, BBC ONE &amp; BBC TWO<br/>         25<sup>th</sup> June, <b>Glastonbury</b>, BBC TWO &amp; BBC THREE<br/>         7<sup>th</sup> July, <b>Sports Relief</b>, BBC ONE<br/>         15<sup>th</sup> July, <b>Open Golf</b>, BBC ONE &amp; BBC TWO<br/>         16<sup>th</sup> July, <b>Proms</b>, BBC ONE &amp; BBC FOUR<br/>         2<sup>nd</sup> August, <b>Olympics Trail</b>, BBC ONE &amp; BBC TWO<br/>         13<sup>th</sup> August, <b>Olympics</b>, BBC ONE &amp; BBC TWO<br/>         1<sup>st</sup> Sept, <b>Personality Test</b>, BBC ONE<br/>         3<sup>rd</sup> Sept, <b>Bogies Gold</b>, BBC ONE, BBC TWO &amp; CBBC<br/>         4<sup>th</sup> Sept, <b>Measure For MeASURE</b>, BBC FOUR<br/>         4<sup>th</sup> Sept, <b>TTN</b>, BBC ONE<br/>         5<sup>th</sup> Sept, <b>Crisis Command</b>, BBC TWO<br/>         9<sup>th</sup> Sept, <b>Fat Nation</b>, BBC ONE &amp; BBC THREE<br/>         11<sup>th</sup> Sept, <b>Last Night Of The Proms</b>, BBC ONE, BBC TWO &amp; BBC FOUR<br/>         11<sup>th</sup> Sept, <b>Score i</b>, BBC ONE<br/>         18<sup>th</sup> Sept, <b>Greatest Love Songs</b>, BBC ONE<br/>         24<sup>th</sup> Sept, <b>Newsround</b>, BBC ONE<br/>         26<sup>th</sup> Sept, <b>Dirty War</b>, BBC ONE</p> | <p>26<sup>th</sup> Sept, <b>Davis Cup Tennis</b>, BBC ONE<br/>         27<sup>th</sup> Sept, <b>Boogie Beebies</b>, CBEEBIES<br/>         9<sup>th</sup> Oct, <b>World Cup Qualifier</b>, BBC ONE<br/>         9<sup>th</sup> Oct, <b>Grandstand - LG Cup Snooker</b>, BBC TWO<br/>         11<sup>th</sup> Oct, <b>Spooks</b>, BBC ONE<br/>         12<sup>th</sup> Oct, <b>Who Do You Think You Are?</b>, BBC TWO<br/>         19<sup>th</sup> October, <b>Little Britain</b>, BBC ONE &amp; BBC THREE<br/>         23<sup>rd</sup> October, <b>Strictly Come Dancing</b>, BBC ONE &amp; BBC TWO<br/>         2<sup>nd</sup> November, <b>Ten O'Clock News Extra</b>, BBC ONE<br/>         9<sup>th</sup> November, <b>Space Odyssey</b>, BBC ONE<br/>         12<sup>th</sup> November, <b>Children In Need</b>, BBC ONE<br/>         14<sup>th</sup> November, <b>FA Cup Football</b>, BBC ONE<br/>         20<sup>th</sup> November, <b>Snooker: UK Championships</b>, BBC ONE &amp; BBC TWO<br/>         21<sup>st</sup> November, <b>Monarch Of The Glen</b>, BBC ONE<br/>         1<sup>st</sup> December, <b>Bhopal</b>, BBC ONE<br/>         1<sup>st</sup> December, <b>Christmas Visions</b>, BBC THREE<br/>         1<sup>st</sup> December, <b>Night Fantastic</b>, BBC FOUR<br/>         4<sup>th</sup> December, <b>Seniors' Tennis</b>, BBC TWO<br/>         12<sup>th</sup> December, <b>Sports Personality</b>, BBC ONE<br/>         18<sup>th</sup> December, <b>Show Jumping</b>, BBC ONE<br/>         19<sup>th</sup> December, <b>Test The Nation</b>, BBC ONE<br/>         20<sup>th</sup> December, <b>Snowflake TV</b>, Cbeebies</p> |
|--|--|--|



Getting people to use services - building the call to action..

1. **Expectation** -understand audience needs & wants
2. **Appeal** -make it attractive and interesting
3. **Grab** -build hook & reward, compel viewers to commit
4. **Tools** -once committed explain how to participate
5. **Interaction** -playing, exploring, sharing, participating





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## NEW DIRECTIONS

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1. Strong  
presenter

### **Call to Action**

- the grab  
& the tools

## Audiences do respond to 'to camera' CTA's

- Olympics - 9 million users, over 60% of ALL Digital TV viewers
- Test the Nation - 1.25m played together over TV
- Mammals - 1.8m viewers & 76% interacted until the end
- Fame Academy - 1.6m viewers, many watched alternate streams up to 2.5 hours at a time
- Wimbledon 4.2 mill, Great Britons 1.1 mill, Eurovision 1.2m



1. Strong  
narrative  
**Call to Action**

-the appeal  
the grab  
the tools





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## **NEW DIRECTIONS**

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Film Corporation**

- SeeWhatHappens.com recorded 11 million hits in the six hours following the ad's debut
- The site received more visitors in its first 24 hours than Mitsubishi Cars.com does in an entire month
- Two thirds of these people watched the full :50 web spot two or more times online they continued to interact with the manufacturer's website by downloading brochures, locating a local dealer, and more





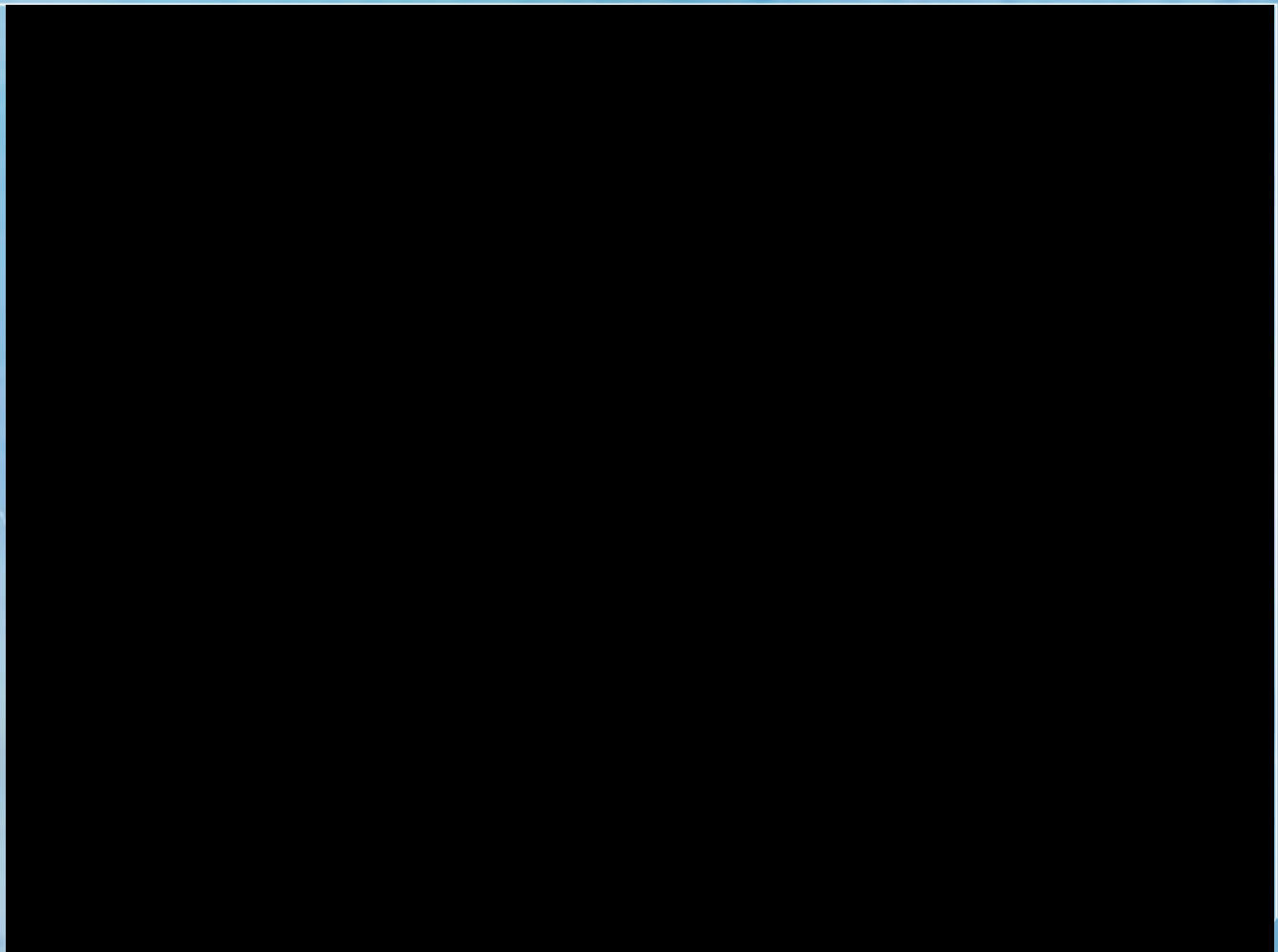
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**NEW DIRECTIONS**

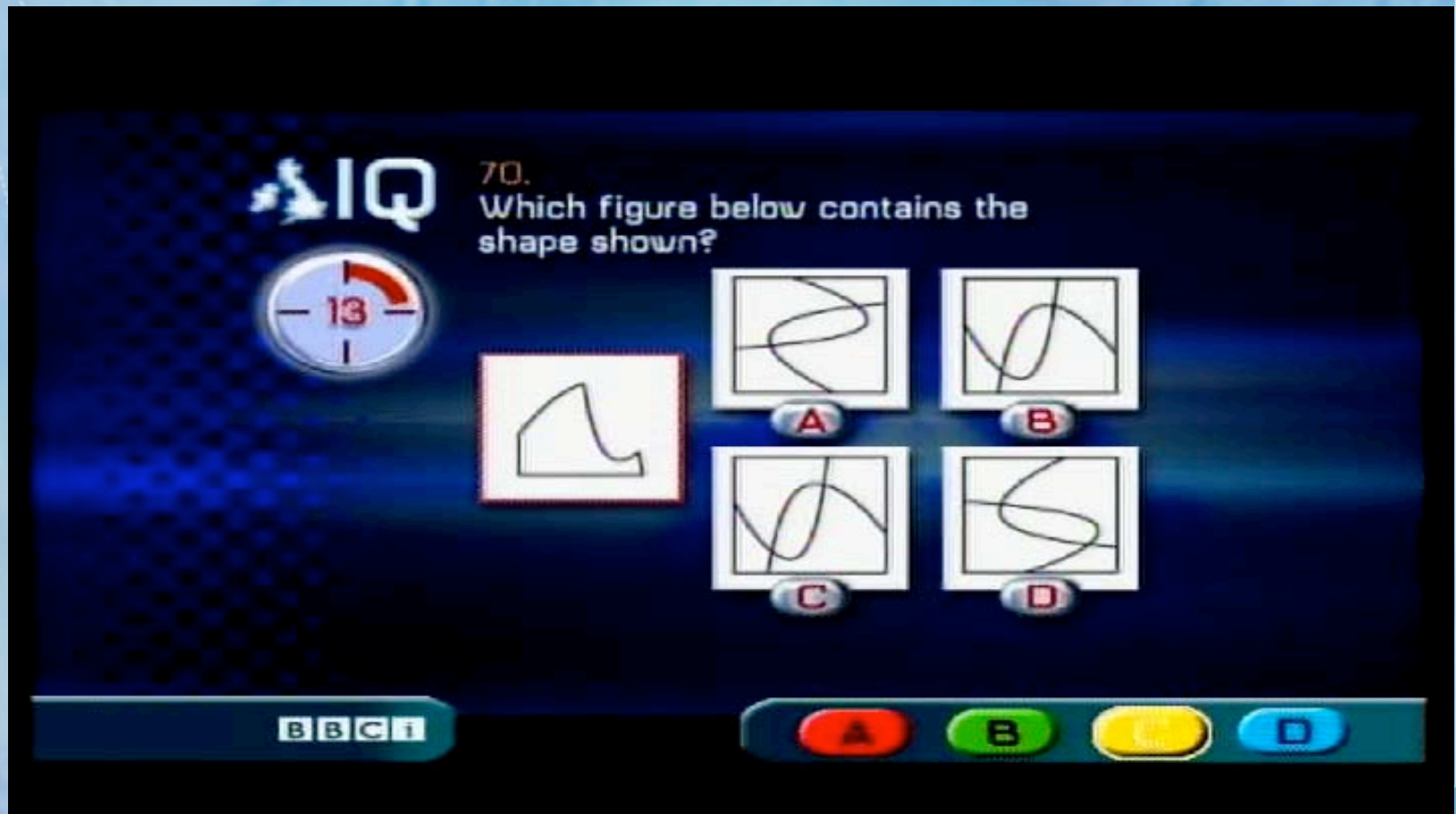
major partner  **South Australian  
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**2. Simplicity,**  
clarity and  
**Integration**  
with story

-the appeal



### 3. Reward - part of the appeal





4. Choice -  
compelling  
and  
integrated





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## NEW DIRECTIONS

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### 5. Audience focus

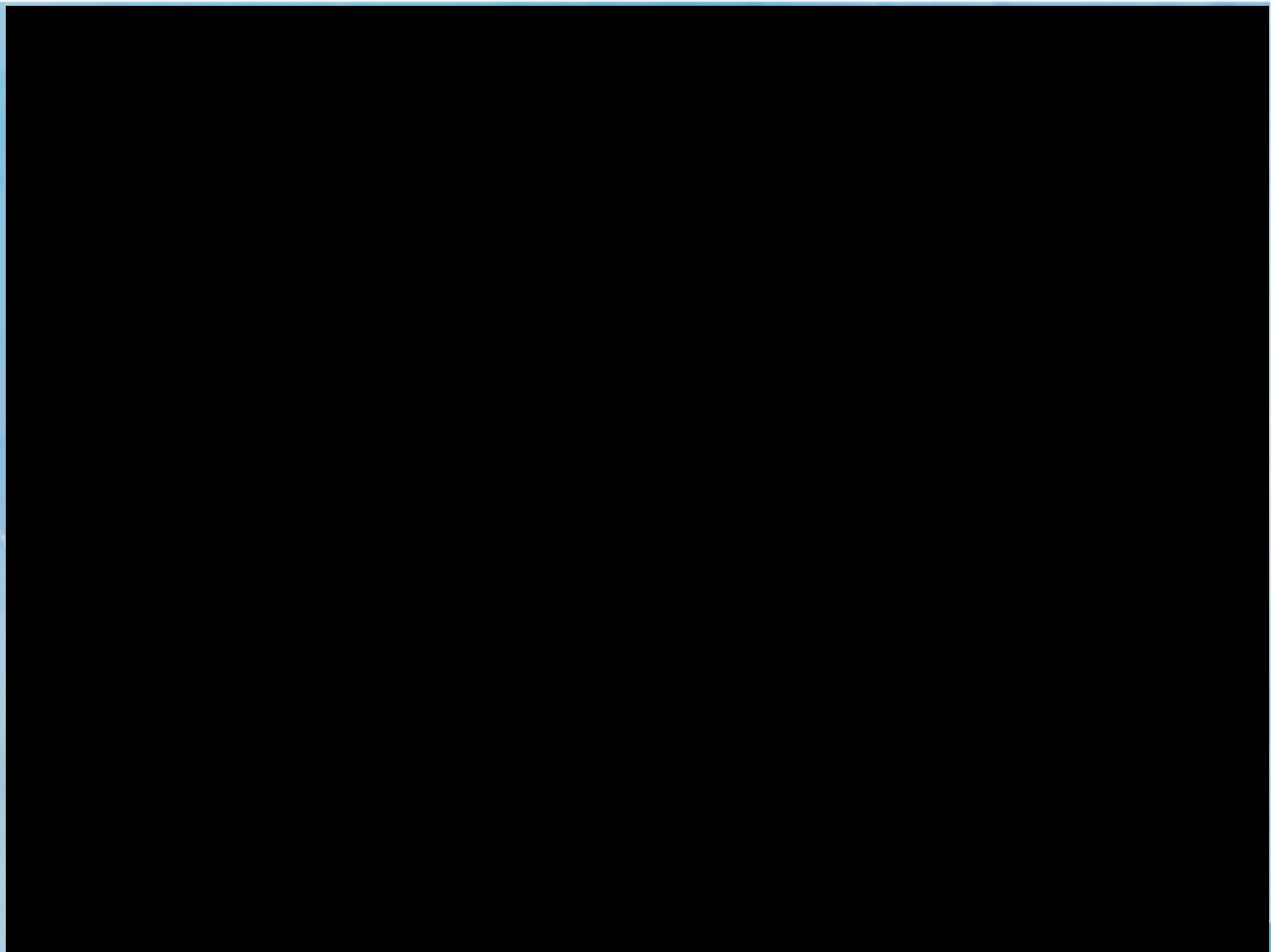
**Understand** them

encourage

**Participation**

create loyalty

-expectation







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NEW DIRECTIONS

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6. Something  
**unique**

*parallel  
non-linear  
tangential  
reverse  
& more  
narratives*





6. Something  
unique

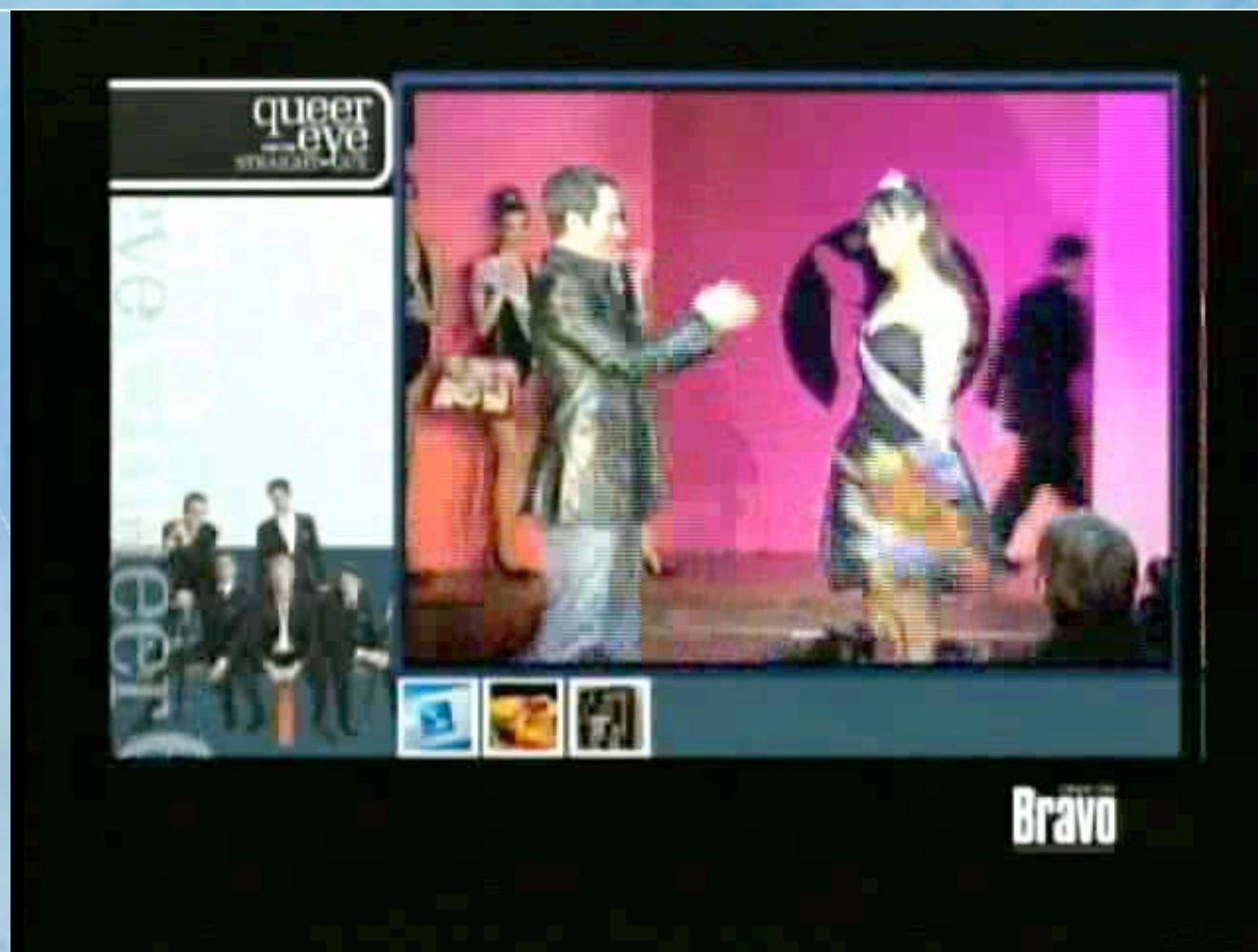


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## WORKSHOP

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Finally  
THINK  
Cross  
Media &  
Platform





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## NEW DIRECTIONS

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So what are the new mass audience 'services' we should be creating:

- New **narrative form**, engaging content - video & gameplay
- Motivating audiences to **contribute, share - thematic & collaborative**
- **Targeted** personally relevant content - "long tail", "mass minorities"
- Services that **connect** audiences across their 'life media'
- Unique, cool and not copycat





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NEW DIRECTIONS

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## In Summary

- Over the next 12 months, advanced broadband video service distribution to TV, PC and mobile will start to create the real worldwide marketplace
- Early wins for producers with compelling, interactive & unique content
- Tell your stories **appropriately** across multiple platforms
- Content producers need to begin creating IP and new formats NOW
- LAMP is part of that process. Thank you - [gary.hayes@aftrs.edu.au](mailto:gary.hayes@aftrs.edu.au)



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**NEW DIRECTIONS**

major partner



An expert is someone who knows  
some of the worst mistakes  
that can be made in his subject  
and how to avoid them

Werner Heisenberg



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**WORKSHOP**

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**EXTRAS**





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**NEW DIRECTIONS**

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## Demo, promotion JibJab

- JibJab's online lampoon received 10.4 mill unique hits in July
- More than three times as many visits as did the official campaign sites of the presidential candidates themselves.
- JibJab didn't spend a cent to promote the movie instead, a promotional e-mail sent out to 250,000 registered members of the company's "fan list" set off a tidal wave of Internet buzz



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**NEW DIRECTIONS**

major partner  **South Australian  
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There is a new generation in Australia

- On an average day in Australia nearly two thirds of 18-29s will use SMS compared with only 3% of 60 and over - McNair
- More than 90% of Australian children aged 6-9 have used a mobile phone - McNair
- Mobile subscribers 2004, Australia 18 mill, China 318 mill
- Mobile subscribers 2009, Australia 21 mill, China 535 mill - IDC Jun 05



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**NEW DIRECTIONS**

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nVod non-linear - three parallel, fixed broadcast time slot, video streams

