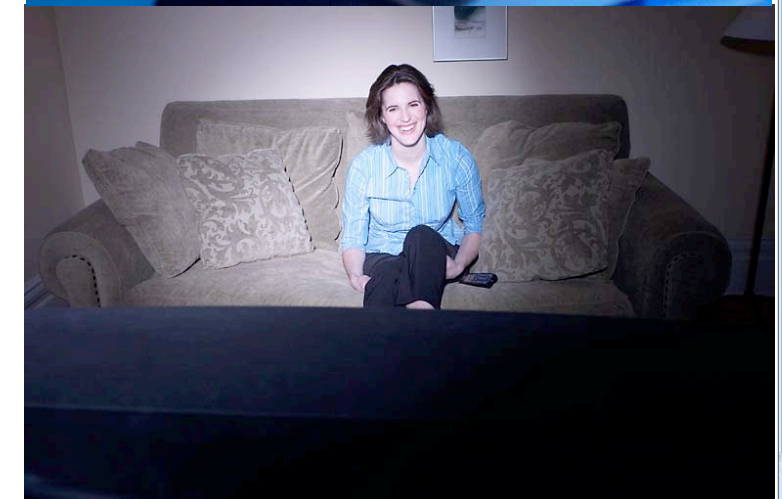
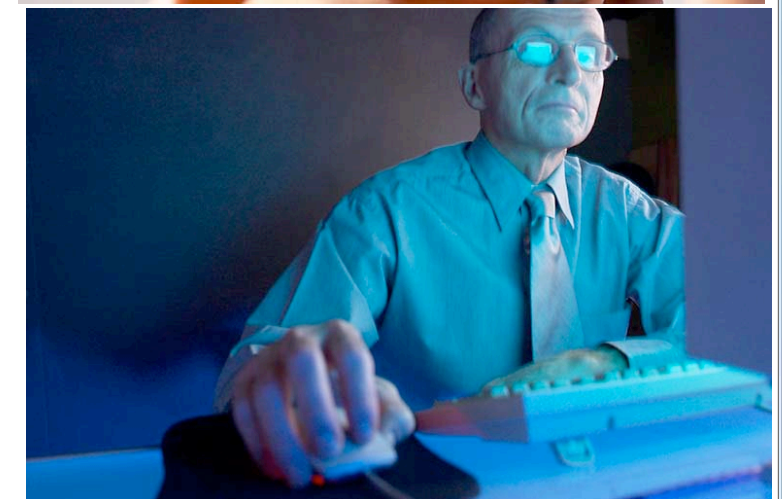


Personalised Audiences Immersive Services

Gary Hayes

Freycinet, Tasmania

29 October - 4 November 2006



The world is changing

94-2004 A reduction of 21% TV viewing for under 24s. *Global Media Analysis*

Program downloading doubled in 12 months to Feb 2006 . *Envisional*

The average 13 year old uses 3-5 times more broadband than the average small business in Australia. *ACCC*

Decline in magazines. Auto Express (-27%); Autocar (25%); Autosport (-9%); and Auto Trader (-8%). Exchange & Mart, fell by 18%. What's on TV (-9%), Radio Times (-6%), TV Quick (-8%), and TV Times (-10%) *Guardian Sep 06*





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The world is changing

20% of the Gen Y group (aged 18-26) ranked TVs top compared with the **37% who rated their PCs as the most important.**

A further 27% preferred their mobile phones

13 September, 2006 The Age

2006 85% listed going online as a favorite leisure activity

69% citing television viewing

14 July, Hollywood Reporter.com

In 2005, Box Office attendance dropped 6 per cent among people aged 25–34

28 Jun, 2006 AFC





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“I WANT IT EVERYWHERE”



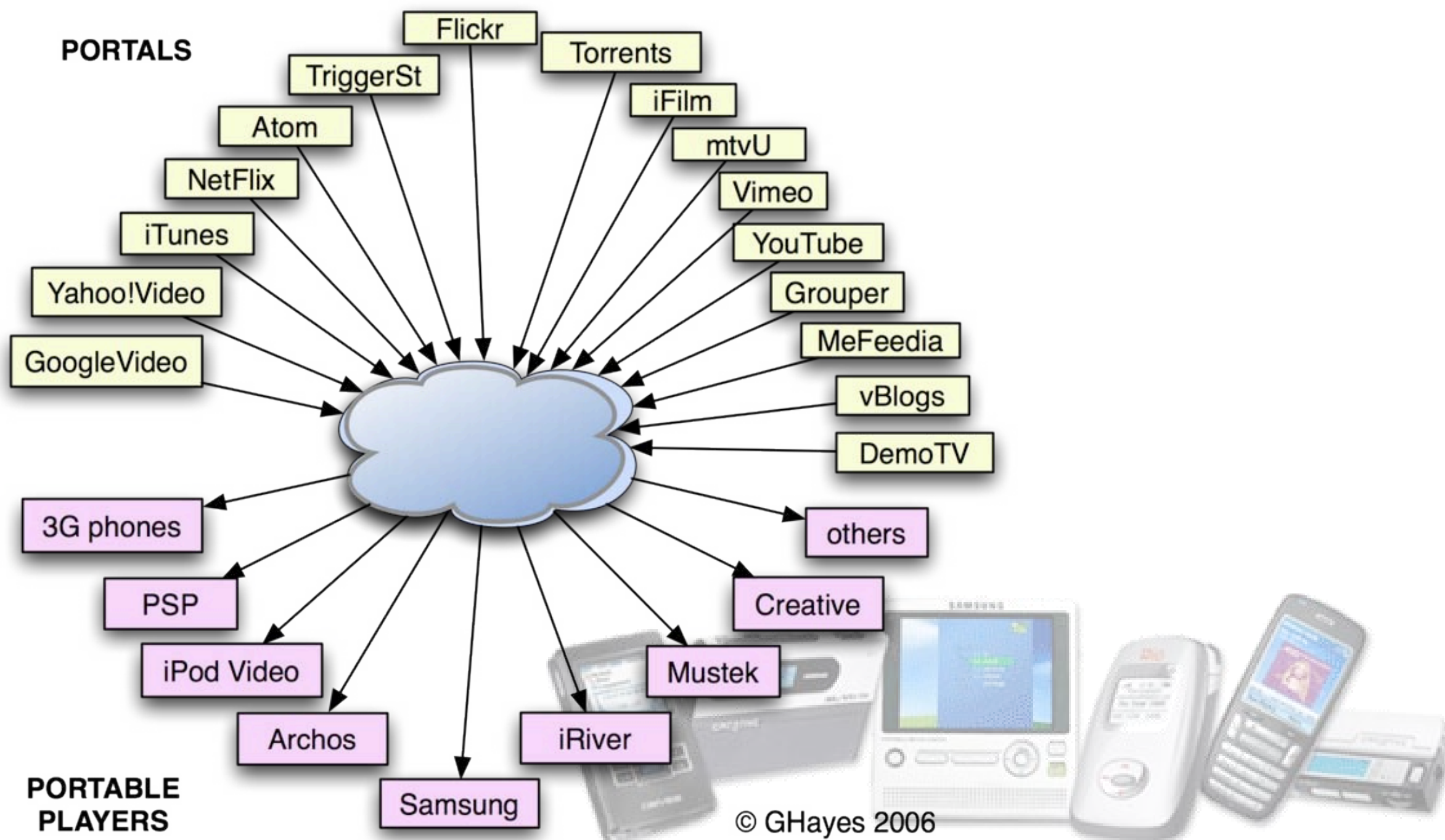
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PORTABLE PERSONALIZED VIDEO REVOLUTION



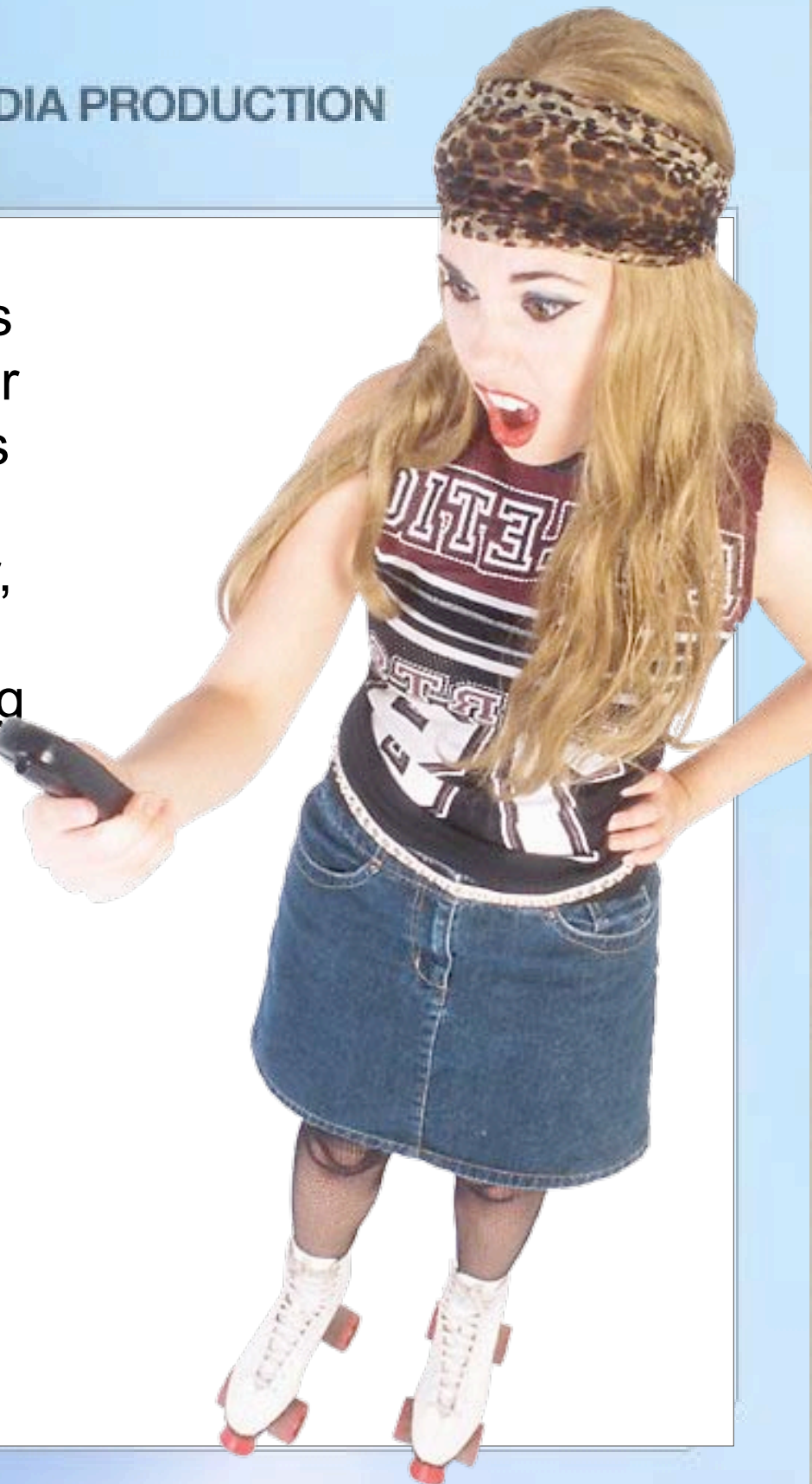
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TRANSFORMINGFUTURES

Gary Hayes, Director AFTRS LAMP
LAMP V, Sunday 29 Oct 2006, Freycinet, Tasmania

- Nokia found that an average of 60 per cent of consumers in Spain, Britain, Finland and France are willing to pay for mobile TV. In France, the average daily viewing time was as high as 23 minutes. - The Age, July 21, 2006
- Most pupils in survey own mobiles by 12 19 September, 2006 -
- 91% of 12-year-olds now own a mobile phone, according to research published today.
- More than half (51%) of 10-year olds have one – The Guardian





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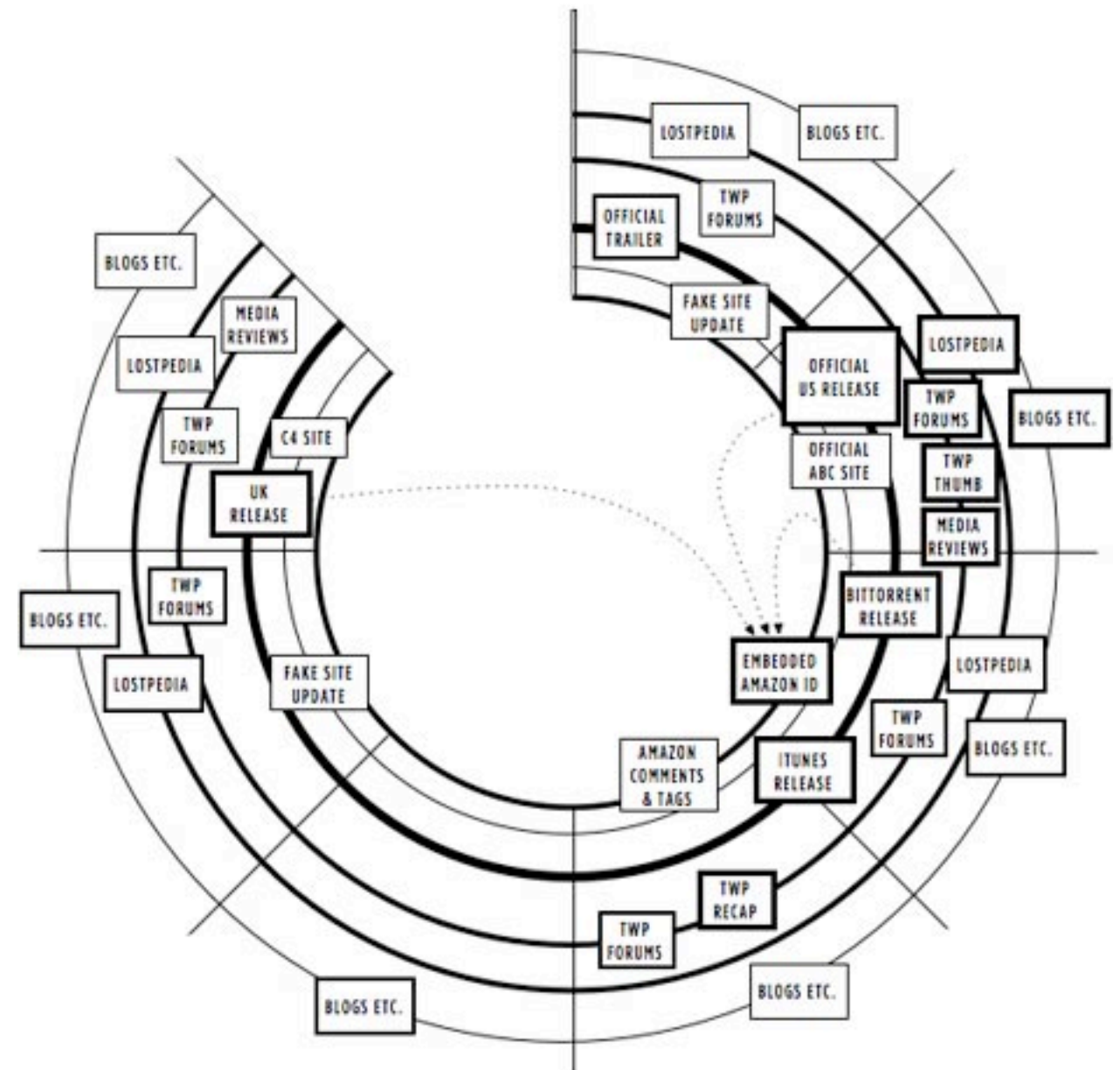
The Cross-Media Paradigm Shift



The Cross-Media Paradigm Shift

“What Lost should indicate for media creators working on the web is that the amount of useful interaction off-site should be far greater than that on your own website. The amount of content produced about your content should be of far greater weight than the originating content itself. This in turn creates a new kind of content, forged from a social process of collaboration with users, viewers, listeners.”

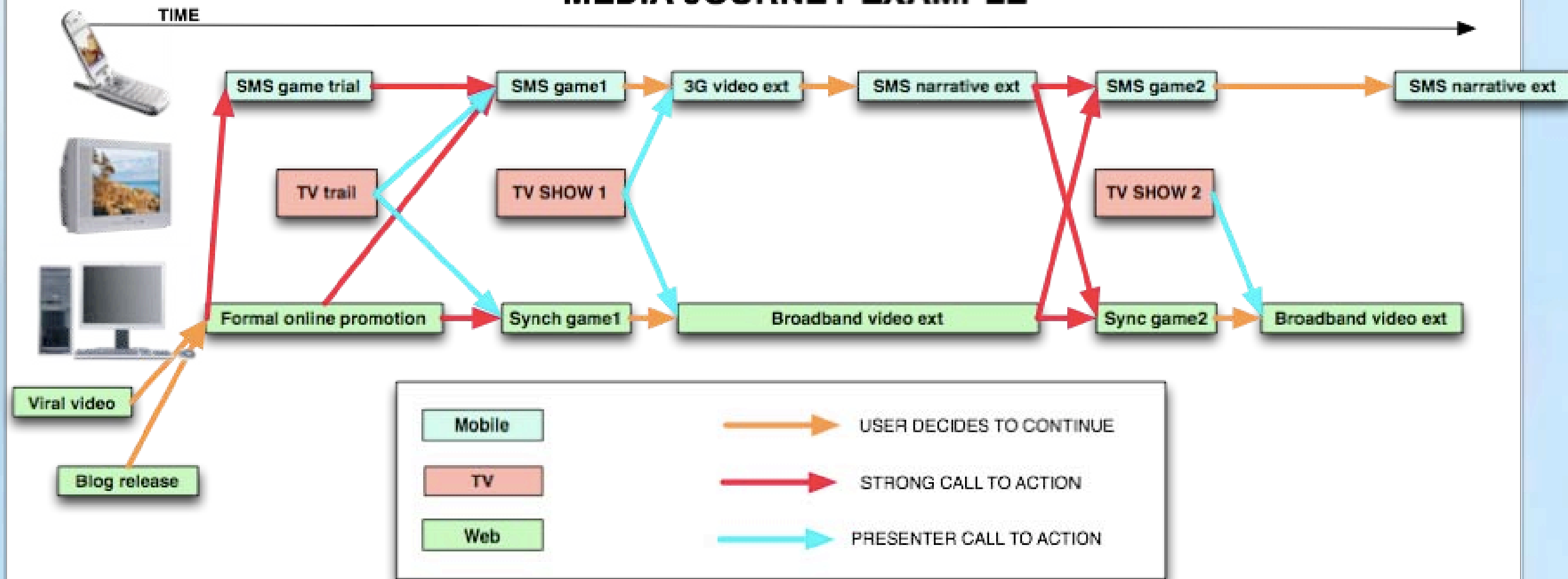
Dan Hill, Head of Interactive Technology and Design BBC Music and Radio <http://www.cityofsound.com/>







MEDIA JOURNEY EXAMPLE

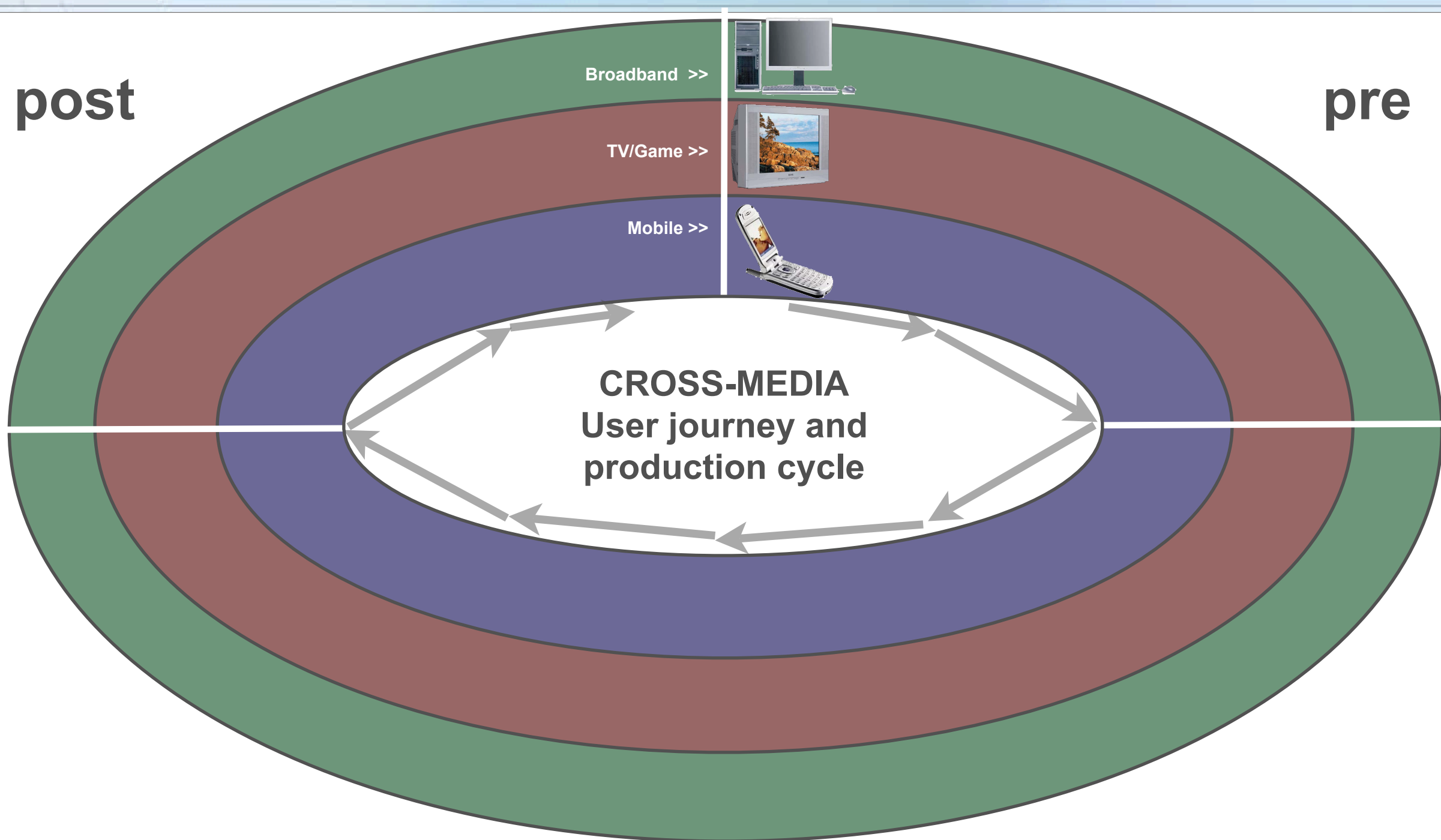


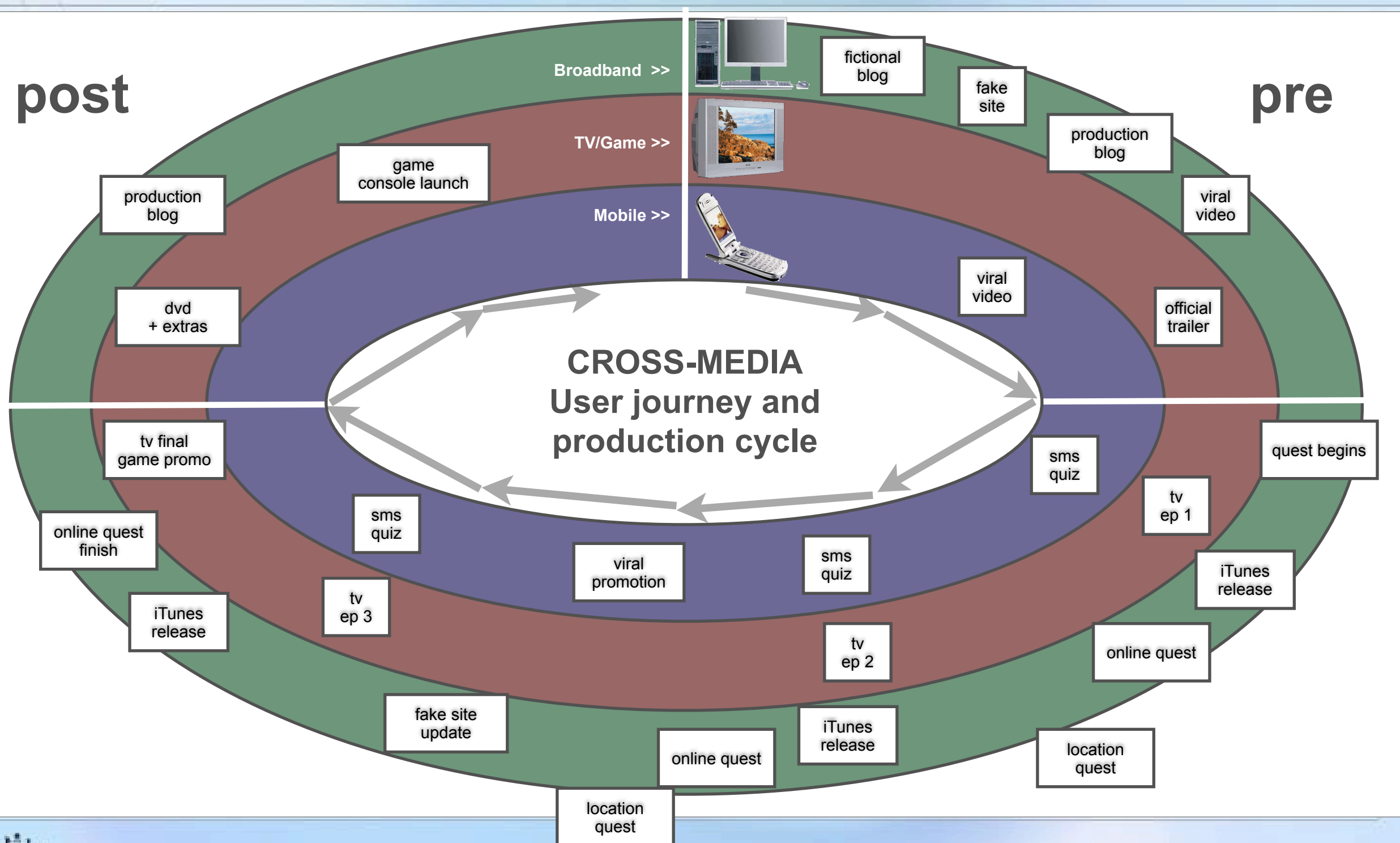


To attract audiences across the range of media delivered across this sea of devices and delivery channels:

- The audiences want 'their' media to be available on any and all platforms at any time
- Audiences want to be able to push and pull their content without barriers
- Professional producers will differentiate themselves from viewer created content by creating interactive cross-media, rather than mono-media and telling 'crafted' stories, that still has 'viewer generated authenticity'









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“I WANT TO ESCAPE”



Losing eyeballs and convergence

Younger (32 av age!) audiences finding more immersive entertainment alternatives

MMORPG gamers spend on average 21.0 hours per week playing the game, and spend on average 7.7 hours per week watching TV.

The national average for TV watching per week is around 28 - In other words time that was spent watching TV has been displaced by MMORPG playing.

Of interest is the spike in play-time among female players over the age of 35.

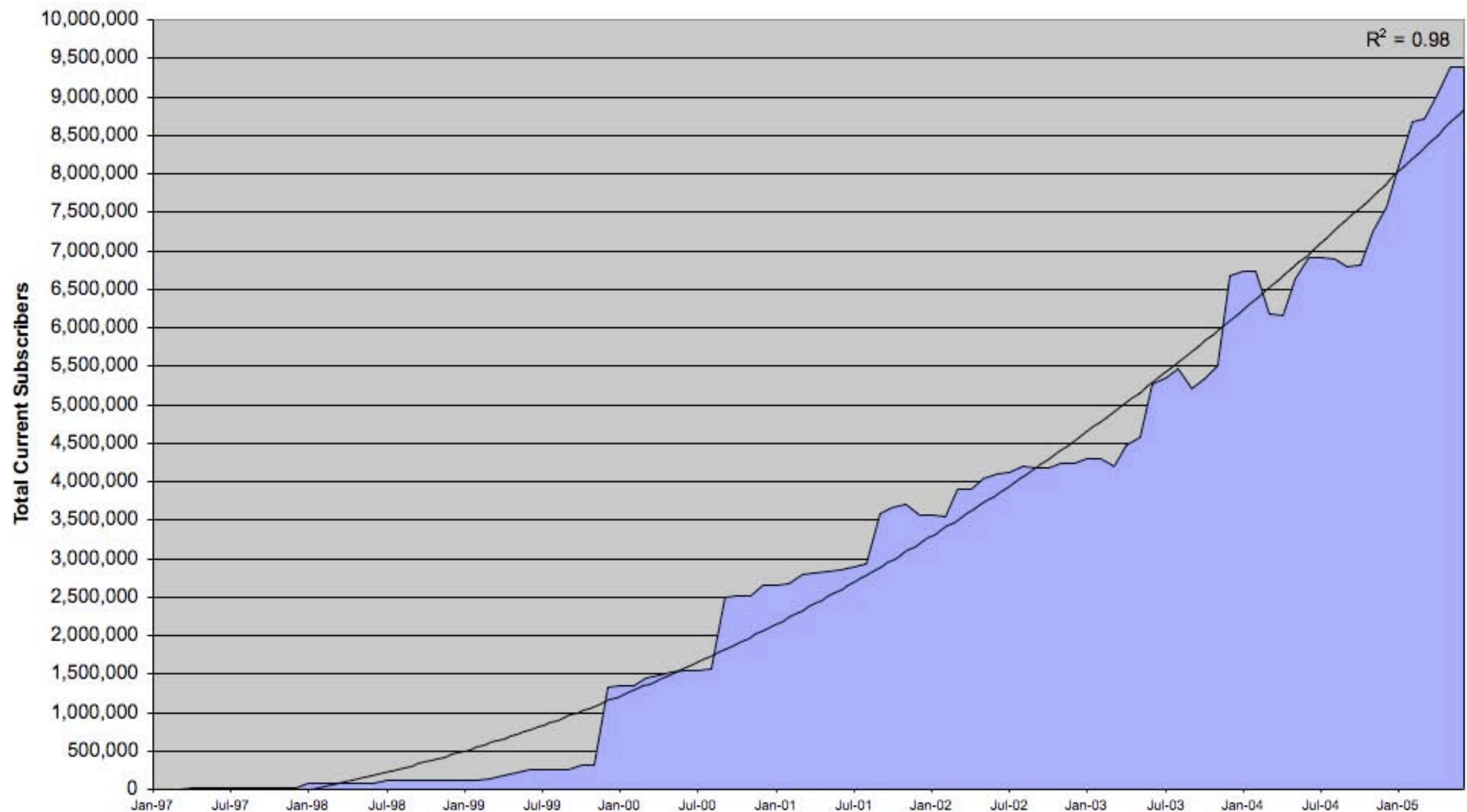


PERSONAL SERVICES

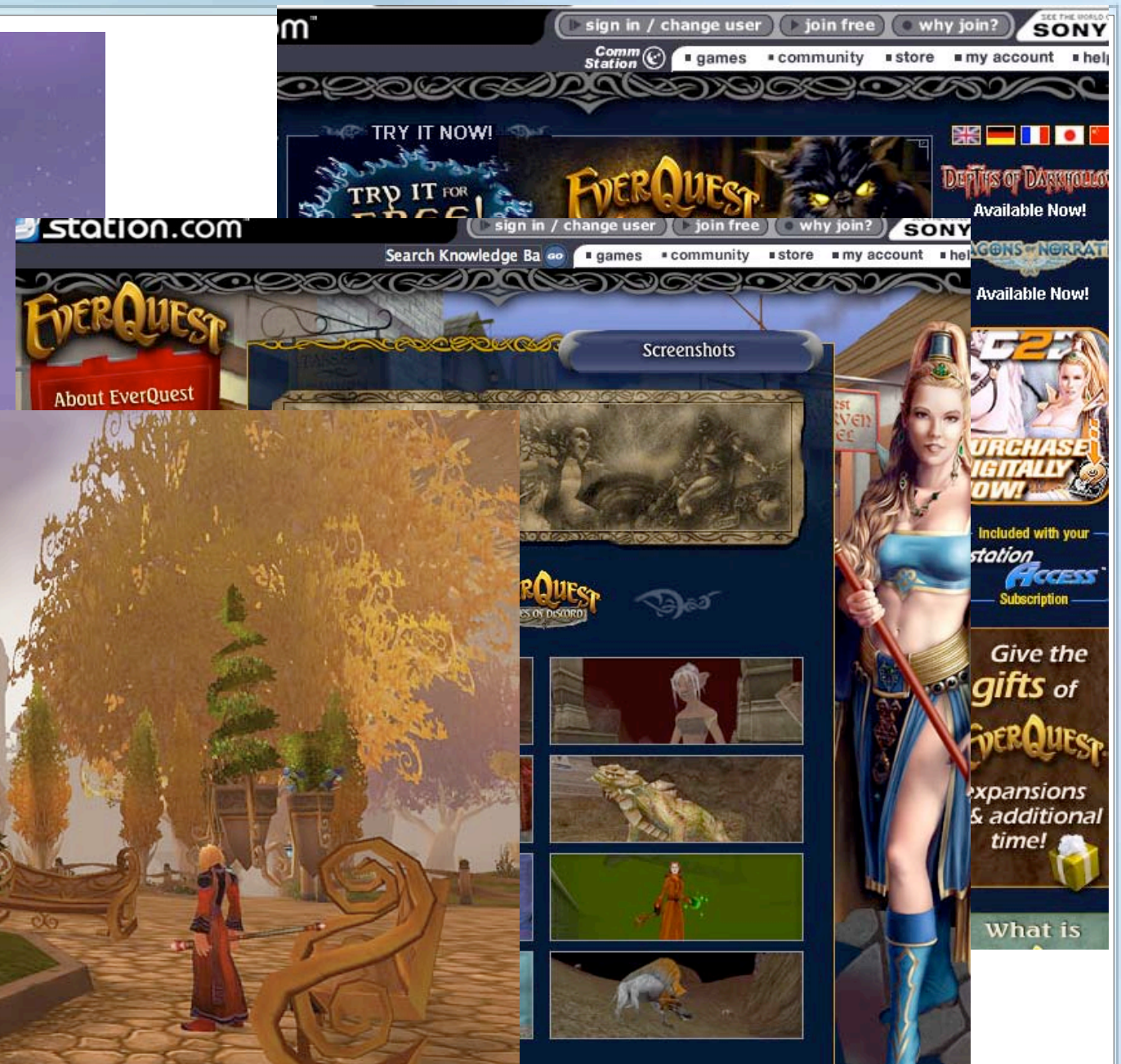
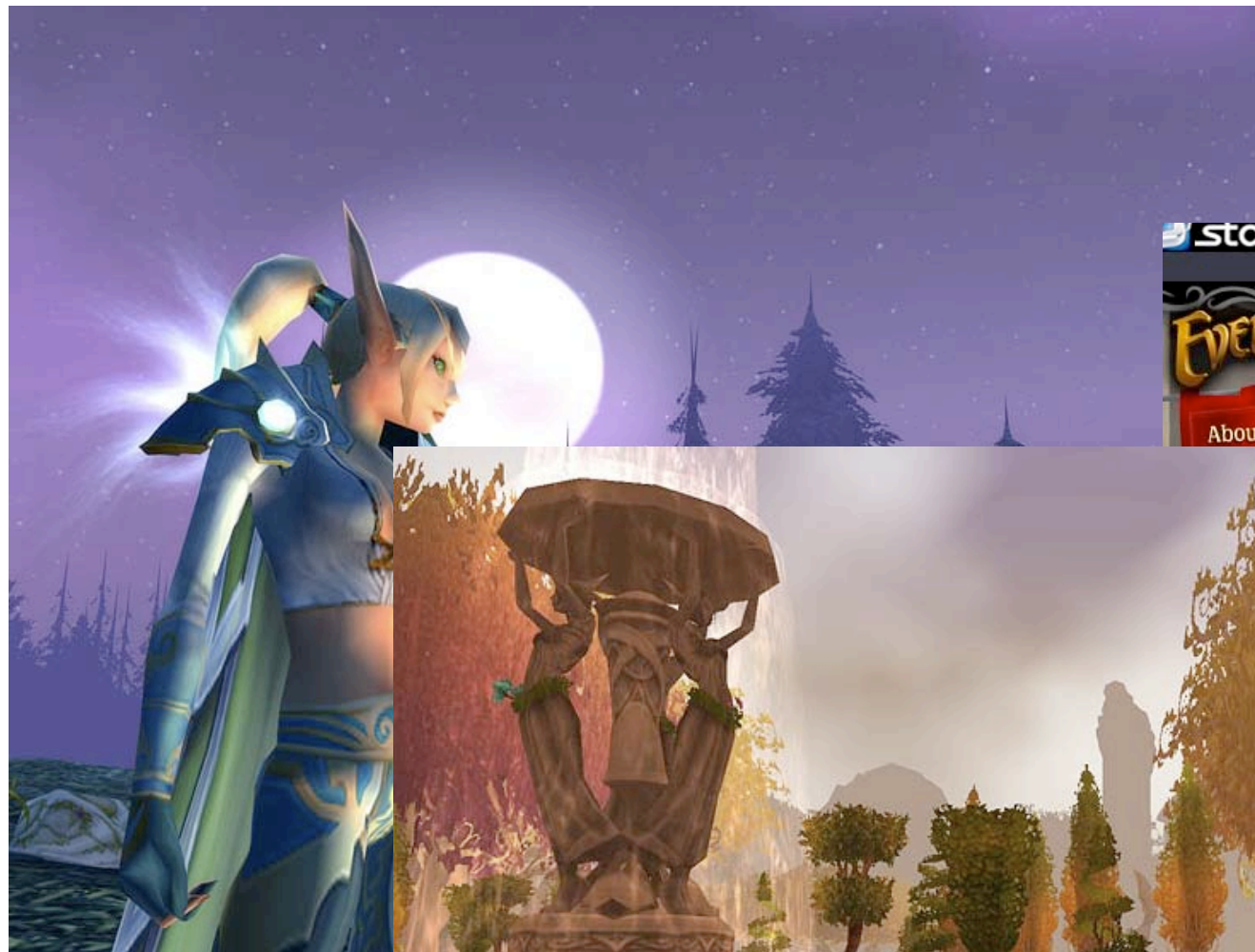
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Total MMOG Active Subscriptions (All MMOGs)



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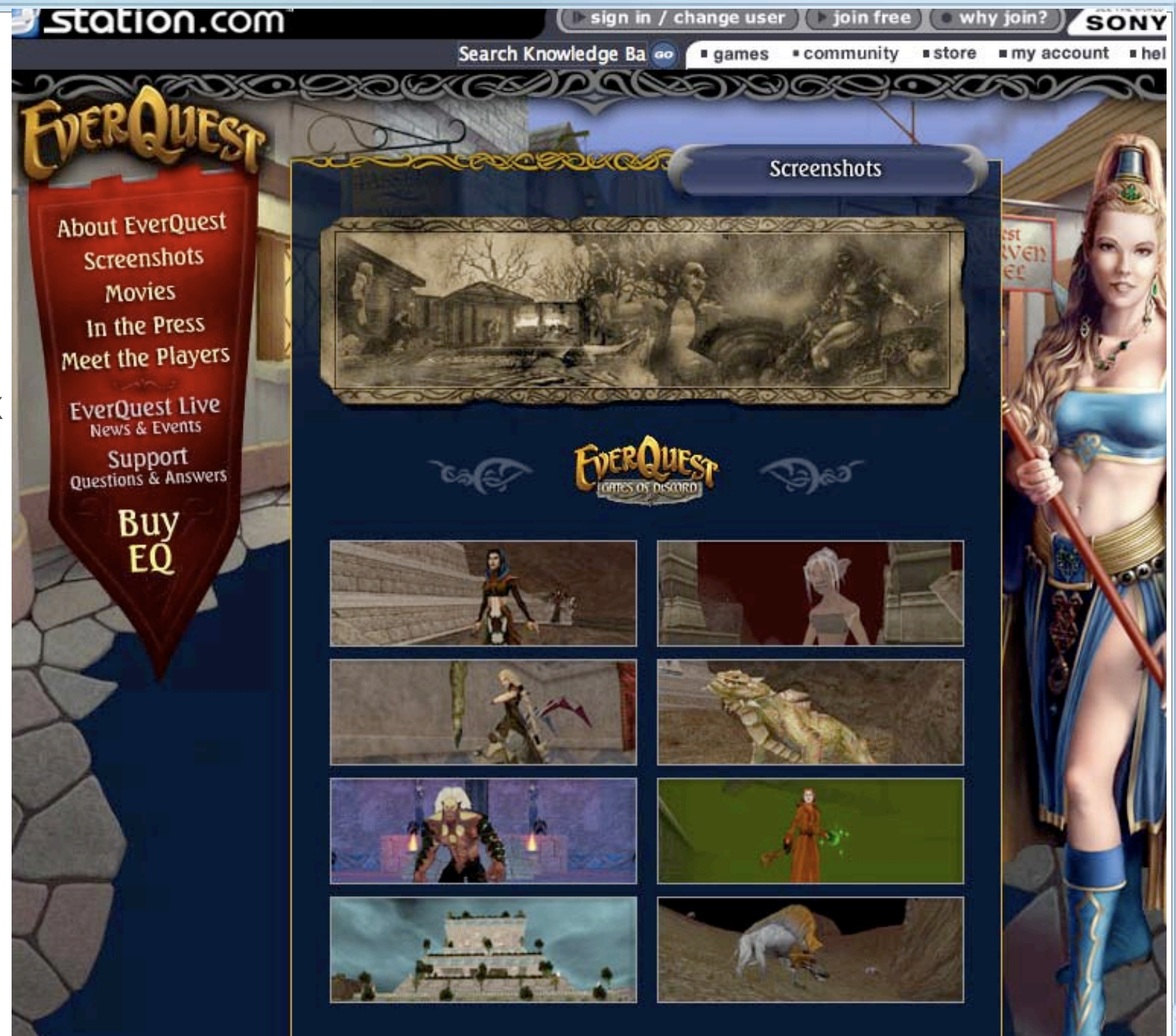


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THE RISE OF MMORPGS

- 25 million players across all MMORPGs at \$10 each pm
- MMORPGS are already at \$2.5bill US in Asia Pacific
- Already games are bigger than box office at \$10bill US
 - In the next 2 years games will surpass music sales
- Sales of virtual property inside RPGs at \$100mill US!
- *Mmorpg = massive multiplayer online role player games*





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**“I WANT TO BE
UNDERSTOOD”**



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The psychographic audience

- Audiences are fragmenting into smaller segments
- Create services most appropriate for those segments
- Select the best ways to reach an audience

Psychographic audiences are based on: beliefs, personal characteristics, social networks, how they spend their \$, behaviour, niche interest groups



The psychographically segmented audience



The psychographically segmented audience



Resigned



Struggler



Succeeder



Explorer



Aspirer



Reformer



Mainstreamer



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Take users on personalized journeys:

- Media is now about 'me'
- Measurement of how 'ALL' users move around your service is not enough - you need to know what 'EACH' user's experience is!
- Content providers need to consider ways to reach the mass niche
- Create services that have resonance and do allow dynamic modification
- Understand the wide range of audience you are delivering too



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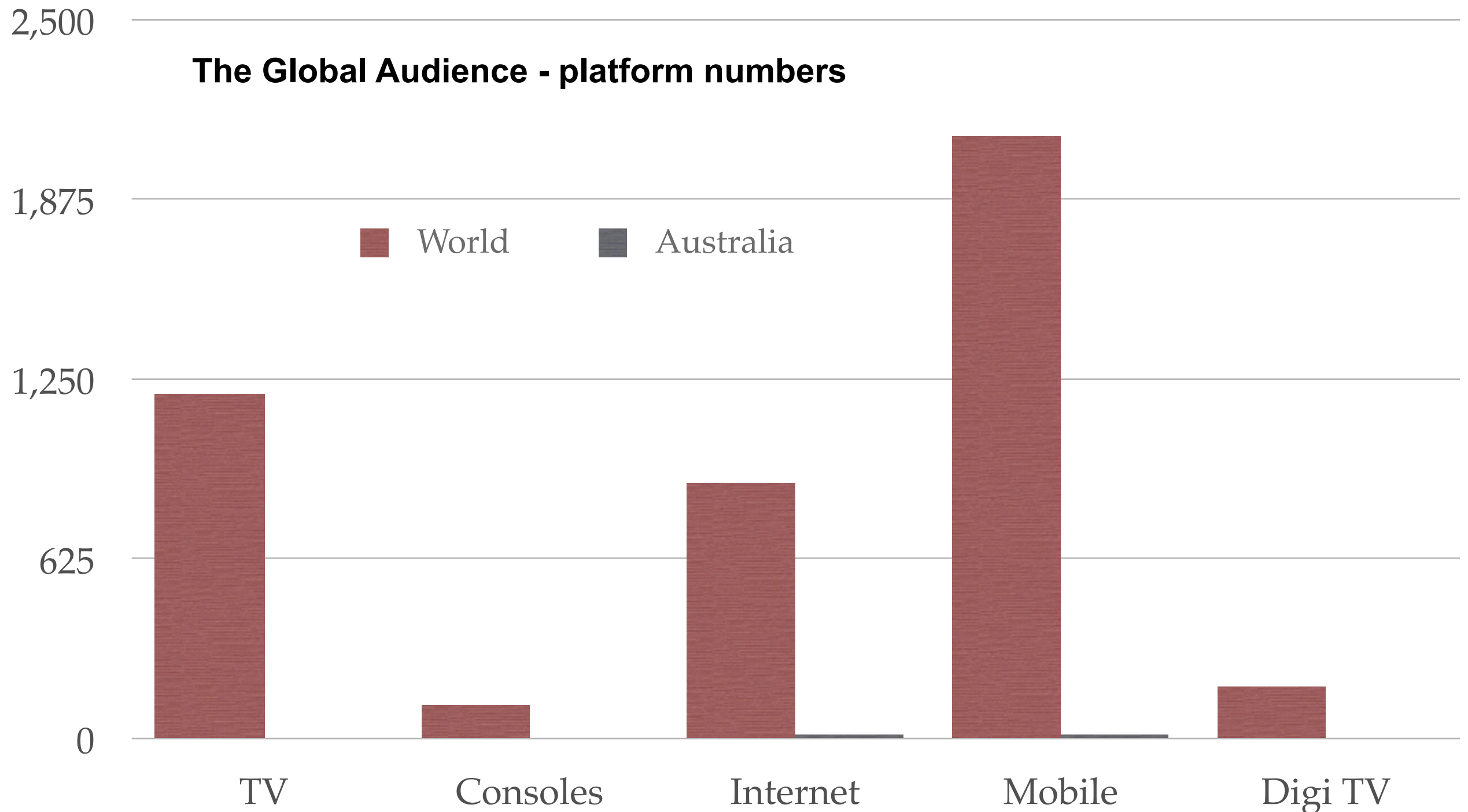
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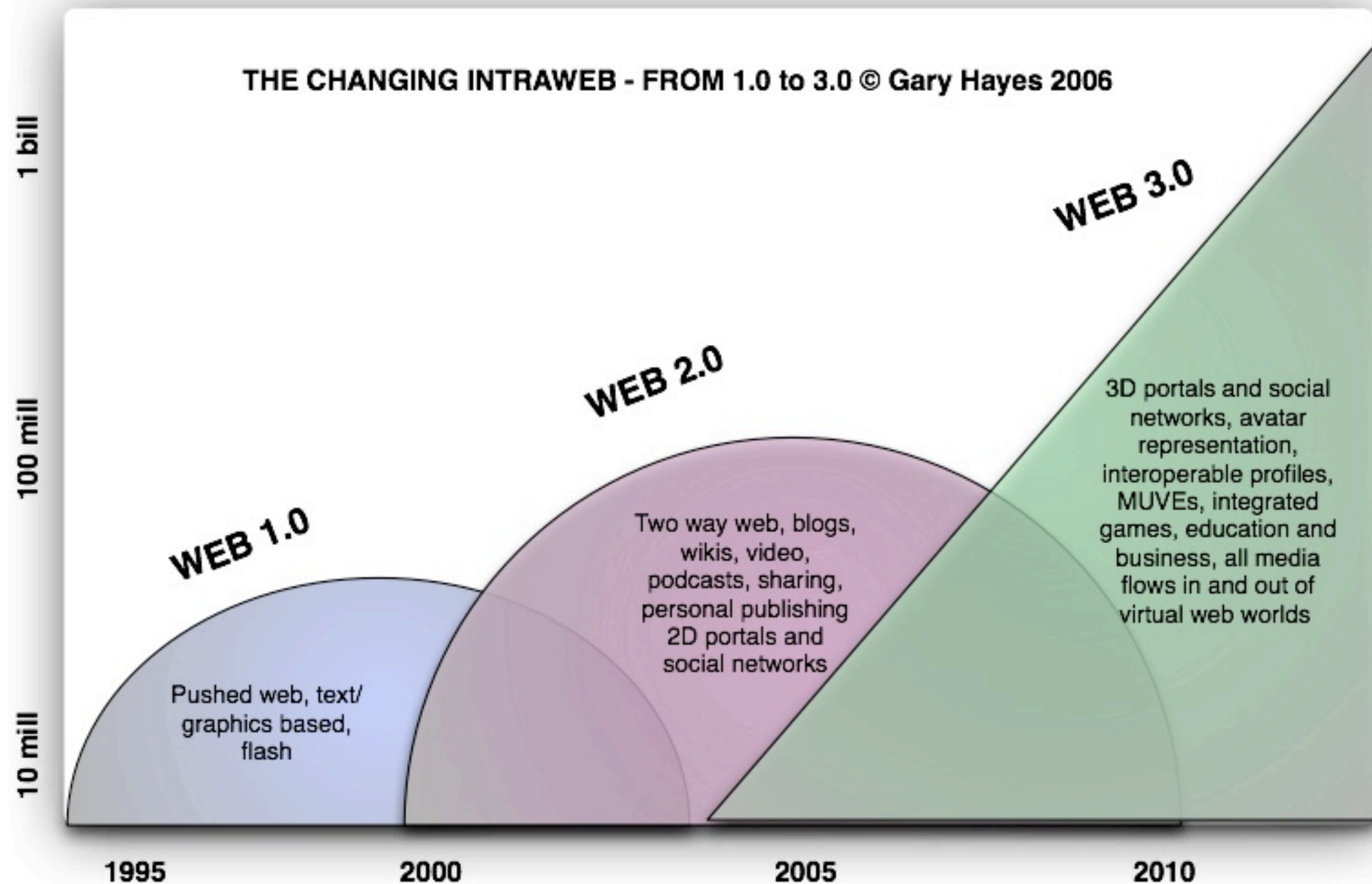


**“I WANT TO CONNECT
WITH THE WORLD”**



The Global Audience - platform numbers







The Future of the intraweb, Web 3.0

MUVE's such as Second Life used by brands, education, business and of course people

Education: Wells Fargo, Idaho's bioterrorism training, USC, 200 major US universities, political campaigns, AFTRS/LAMP, Harvey Rheingold, Lawrence Lessig

Performances: BBC, U2, Duran Duran, Suzanne Vega,

Brands: American Apparel, Universal Music, Nike, Playboy, Lego

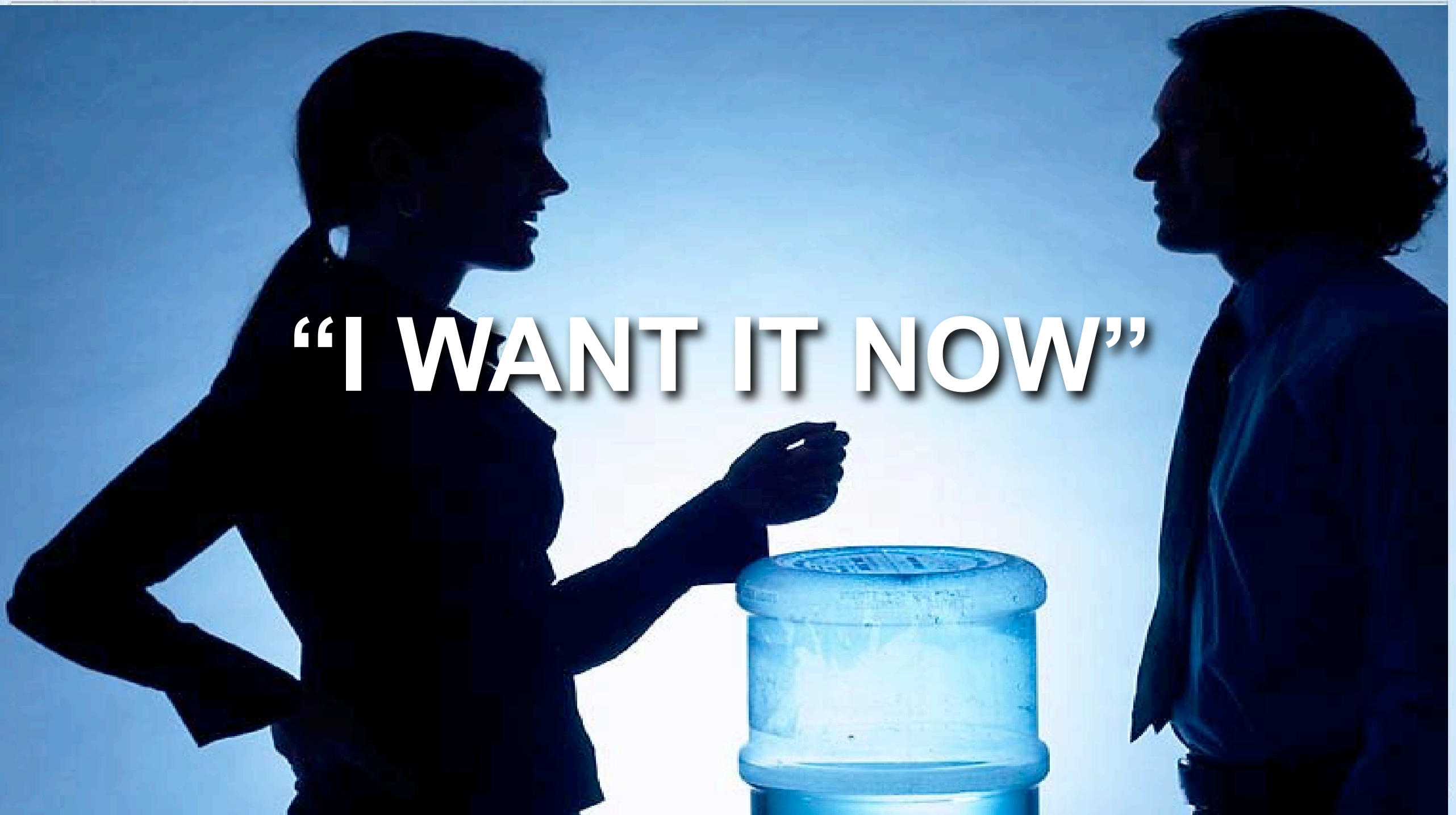




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“I WANT IT NOW”





THE UK FUTURE

- The BBC expects that by 2016, seven in ten homes will be able to schedule their viewing and listening at a time that suits them best – PVR & broadband

“This decade will be the decade of on-demand. 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?...That's why it's a category error today to define or delimit the BBC around linear real-time TV and radio”

Mark Thompson, Director General BBC



VOICE - TV - DATA

down one pipe the great triple play





- * 12 September, 2006 A recent AP-AOL Video poll found that more than half of Internet users have watched or downloaded video. News clips were the most popular, seen by 72 percent of online video viewers, followed by short movie and TV clips, music videos, sports highlights and user-generated videos like those on YouTube Inc.'s popular Web site.— The Age
- July 20, 2006 - Australia - ABC Radio will top 2 million podcasts a month by the end of 2006, leading the forecasts of its closest commercial rival, Austereo, in a booming trend which shows little sign of abating. - SMH





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“I WANT TO SHARE”





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- “more content will be created over the next two years than **over the entire history of mankind**—and 93 percent of it will be digital.” Accenture
- **Podcasters** nearly 5 million worldwide (83% are male)
- BitTorrent - 35% of all internet traffic. *CacheLogic Feb 05*
- 83% of 18-24 years olds demand, **personalisation**. *eContent 2005*

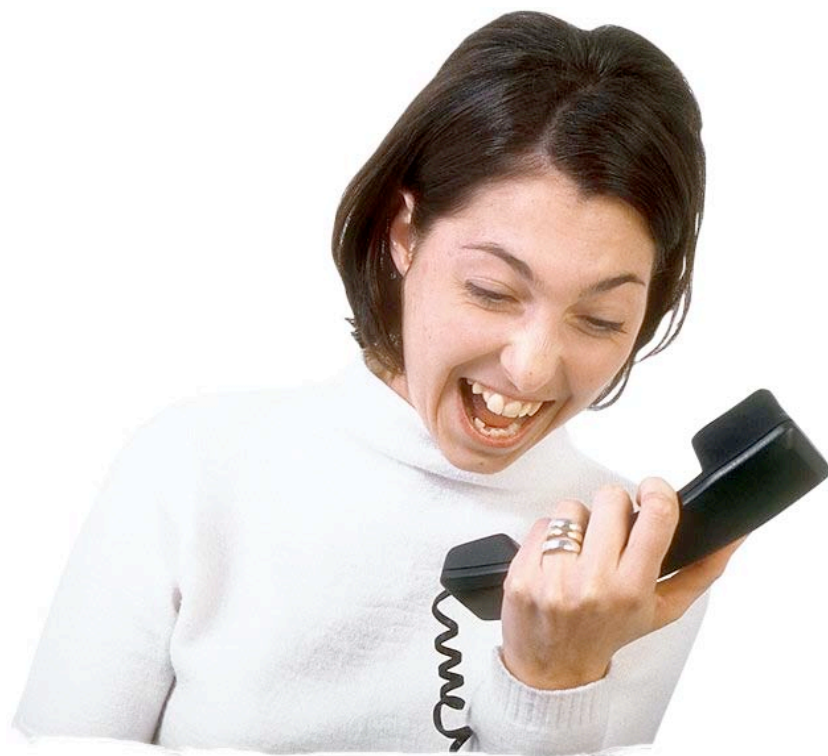


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When and what do they share?

Daily or most days - 25%, Several times a week - 23, Once a week - 15,
Several times a month - 11, Several times a year - 15, Never - 11

The most popular content is humorous material, with 88 % forwarding jokes or cartoons.

A study by Sharpe Partners



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52 % of bloggers said they blogged mostly for themselves, to express themselves creatively and 50 % said it was to document and share personal experiences. *July 20, 2006 - US report by Pew Internet & American Life Project*

- The blogosphere is doubling in size every 6 months
- It is now over 60 times bigger than it was 3 years ago
- On average, a new weblog is created every second of every day
- 19.4 million bloggers (55%) are still posting 3 months after their blogs are created

19 Apr, 2006 - State of the Blogosphere David Sifry technorati



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Viewers want to tell their story - blogs for instance

- One **blog** created every second, there are over 110 million worldwide and it doubles every 5 months. 27% of all internet users read **blogs**
- The Vice President of **General Motors runs a blog** and he is already having a direct relationship with his customers
- Gizmodo (a gadget blog) has enormous power and can **make and break** a product even before it is launched
- **Social currency** - links to your blogs, comments on your blogs, subscriptions
- The RSS (really simple syndication) element that can follow blogs - 1.3 million posts a day



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“I WANT TO TAKE PART”





- Strong presenter and narrative **call to actions** – the more personal the better (*recognition, attraction, invitation*)
- Make sure the interaction and alternate content is integral, deep and **NOT a superficial add-on**
- Be clear about the **reward** for viewers and tell them what it is
- If you are providing alternate media choice, make sure it is **compelling** in its own right
- **Encourage audience participation** through understanding their needs and expectations
- Do something **unique** that drives initial interest – viral uses recommender methods for example



TV in Transition. Advanced TV & Participation TV

Showtime's '**L Word**' have allowed viewers to write the episode

Ratings went up by 51%, the site got 175,000 visits & over 3 mill page views.





April, 2006. Despite only a third of homes being enabled, over 75% of advertisers (according to IDS) have given iTV advertising a whirl and many have found it extremely successful. Only 2% say that it was an outright failure. article Media Guardian





GARY WHAT'S COOL

Collaborative MUVE's



GARY WHAT'S COOL - Collaborative MUVE's





GARY WHAT'S COOL - Collaborative MUVE's



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Thank you and good afternoon!

personal blog - www.personalizemedia.com

virtual blog - www.justvirtual.com

work blog - lamp.edu.au

