“Building audiences through Broadband, TV and mobile interactive service futures”

“the natural evolution”
GARY HAYES

“One of many children playing with crude, caveman-like tools of interactive communication at the beginning of the 21st century.”
MY TALK

“Those who cannot remember the past are condemned to repeat it.”

George Santayana (1863 - 1952)

“There is nothing in emerging media that is entirely new - and this will always be true. Humans tell stories to each other, they always will. New tools to enrich that process will evolve by natural selection”

Gary Hayes (this morning)
HELLO - 9 years ago

Welcome to the Musical Nomad Online Expedition. The Musical Nomad was a production which took place late Summer of 1997, devised & produced by Gary Hayes of BBC Broadcast Interactive. This programme researched audience interactivity using the latest satellite technologies. It was a musical journey in Central Asia, from Bukhara in Uzbekistan to the Altai Mountains in Mongolia, 3500 miles through a magical land full of ancient emotional music with relevant messages for the modern world.

Join Jan (our presenter and flautist) on his daily journey complete with photos and audio excerpts as he travels across the desert steppe. He even says...

"...even as words fail..."

In 1961 there was no such medium as the World Wide Web. Had it existed it would probably have failed to announce the birth of Diana Spencer. Last night we stood in a Kazak field a thousand miles from anywhere.

"Broadband, TV & mobile futures - Natural Evolution"
HELLO - 9 years ago

“Broadband, TV & mobile futures - Natural Evolution”

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HEHello - 9 years ago

This journey is only the beginning

We set ourselves the impossible task of reflecting on the last six weeks in the space of a few hours. As we have been doing all along, what follows are the immediate impressions of all members of the team. We will continue to add to this site over the coming months. Please continue to send Emails and we will endeavour to answer them.

Choose a Perspective

JAN - GARY - PAUL - KATHRIN

Named by SaprbeK
Kasmambetov, one of Kyrgyzstan’s few manaS
epic singers. Besides being an esteemed
musician SaprbeK is also a well known journalist.

"Broadband, TV & mobile futures - Natural Evolution"

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THE BREAKFAST SPECIAL

Flashback
Where are we?
A UK interactive evolution
An Australian evolution?
LAMP
The future - another prediction
FLASHBACK TO SSBP March 2000
The World in 2009 - according to Gary at SSBP, March 2000

• The World Wide Web of early 2000 is regarded as a ‘low resolution’ pilot

• Every individual can become a producer of content which is available to everyone else - if they want it.
  • All ‘content programme brands’ have elements in all of the above

• Everything can be made portable & kept forever
  • CD collections, home movies, personal photographs are stored here too

• Now anything else is available on demand from anywhere over vast broadband networks.
  • Everything is ‘pulled’, only personally relevant content is ‘pushed’.
  • The words ‘TV’ ‘radio’ & ‘internet’ disappeared from our vocabulary. Even the word ‘interactive’ went - everything is now interactive
  • Scheduled ‘live video’ becomes a special group shared event - there is only one broadcast channel in each country - these events generate most online discussion

• The home becomes a personalised entertainment and life system where everything is centralised - games, video, shops, audio, text, email & vmail & banking.
  • ‘Open Standards’ killed off all proprietary platforms in 2005 and the large ‘trusted’ traditional broadcasters collaborated and produced one navigation system that all companies adopted
  • True to all predictions the ‘interactive’ fridge becomes the most popular, connected device in the house
FLASHBACK TO SSBP March 2000

Making interactive pilots

-Video shown at SSBP Mar 2000

"Broadband, TV & mobile futures - Natural Evolution"
The ‘idiots’ guide to platform fragmentation

Diagram ©Gary Hayes & Christy Dena 2005
THE CHANGING MEDIA WORLD

KEY STATISTICS

• Broadband now in 176 million homes worldwide (& 100 million laptops)
• In US broadband homes 58%, in those homes up to 40% less TV viewing
• Nearly 2.1 billion people have a mobile - over one third of the planet
• 53.3% of under 24yr olds say they use internet to watch video vs 27% of older
• Australia leads the world per capita in illegal downloads of TV over broadband
• 10 million PSPs sold already worldwide - fastest selling games device ever
• Over 84% of 7-17 year old Australians own a game console – Nielsen 04
The global 2002 electronic games market was $40.8 billion, surpassing box office receipts of $39.6 billion. Pwc
THE CHANGING MEDIA WORLD

ACCELERATION - THE LAST THREE WEEKS!

• In its first 3 weeks Apple had 1 mill iPod video downloads at $1.99 US
• ABC will earn $1.20 per download. Even if 20% of the show’s audience shifts its viewing from traditional TV to iPod, ABC would still net **$1.8 million more** per episode of it’s top shows
• Warner Brothers launched **web based In2TV** that will let fans watch on-demand full episodes from more than 100 old television series. More than 4,800 episodes will be made available online in the first year.
• Comcast’s ON DEMAND service has had more than one billion program views so far this year. Now CBS is offering within hours after they air, prime time TV, **commercial free**, for just 99c
• NBC via DirecTV’s new PVR is selling prime time shows for 99c
• Earlier this week TiVoToGo (which allows users to transfer recorded shows to a PC) announced software that will move these to video iPods and PSPs (TV companies in the US said they will sue)
NEW MARKETS

Broadband will be...
NEW MARKETS

…the new TV, of course

“Broadband, TV & mobile futures - Natural Evolution”
NEW MARKETS

“The future, according to some scientists, will be exactly like the past, only far more expensive.”
John Sladek

VOICE - TV - DATA
down one pipe the great triple play
NEW MARKETS

bring your home to life from just £14.99 a month for the first 3 months, then from £17.99 a month.

1MB broadband
Don’t hang around – 1MB high-speed broadband gives you instant access to web pages, emails and sound files, and there’s no need to unplug your phone when you go online. You get 12 Homechoice email addresses and 100MB webspace as standard. For even faster connection you can upgrade to 2Mb or even 8Mb. Plus, if you opt for wireless, you can enjoy internet access from around the house.

2 digital tv
There’s something for the whole family with over 50 great digital television and radio channels through your TV including

3 free calls
Enjoy free calls* – so you can tell all your mates what they’re missing. You’ll still pay your usual line rental to BT.

4 video on-demand
Over 1,000 films to ‘rent’ any time, which you can PAUSE, RWD or FFWD just like a DVD.

Plus, Homechoice Replay™ lets you watch some of the most popular BBC and ITV1 programmes on demand for up to 7 days after they’re first shown.

call 0800 072 4493 and ask for our 1MB Base Pack or visit homechoice.co.uk

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UGC - USER GENERATED CONTENT - People Publishing Revolution

• “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

• **Podcasts** 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*
UGC - USER GENERATED CONTENT - People Publishing Revolution

SO WHAT ARE THE NEW KIDS ON THE BLOCK?

Social computing - e.g.: blogs

User generated - e.g.: podcasting (aod), vBlogs (vod)

Distribution - e.g.: bitorrent

Mobile - e.g.: portable play station, video iPod, 3G phones

Converged - e.g.: Media Centre, PVRs, iTV
UGC - USER GENERATED CONTENT - People Publishing Revolution

BLOGS
• One blog created every second, there are over 20 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
UGC - USER GENERATED CONTENT - People Publishing Revolution

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.
UGC - USER GENERATED CONTENT - People Publishing Revolution

“What Broadband, TV & mobile futures - Natural Evolution”

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UK 2000-5 - MEDIA TRANSITION

“Broadband, TV & mobile futures - Natural Evolution”
UK Digital Landscape

• June 2005: Digital TV has reached 63.0% of UK households. (Australia < 10%?)
• Broadband now at 38% - almost the same as Pay Satellite (Sky)
• Sky+ (Personal Video Recorder) already in over 1 million UK homes
• 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
<table>
<thead>
<tr>
<th>Year Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-2012</td>
<td>BBC begins to distribute all services via broadband IPTV like pipes</td>
</tr>
<tr>
<td>2005-2007</td>
<td>Transition from broadcast to on-demand, PVR to IPTV</td>
</tr>
<tr>
<td>2004</td>
<td>BBC post DSL trials moves into broadband distribution. 13 million + 8 mill</td>
</tr>
<tr>
<td>2003</td>
<td>Broadcast apps begin to emulate on-demand using MS. 10 million</td>
</tr>
<tr>
<td>2003</td>
<td>Return path provides communication services for the audience. 10 million</td>
</tr>
<tr>
<td>2002</td>
<td>Synchronisation creates audience focused services. 8 million</td>
</tr>
<tr>
<td>2001</td>
<td>Multistream services begin. Guarantee the success of BBC iTV. 5 million</td>
</tr>
<tr>
<td>1997-2000</td>
<td>Foundational services pave the way. Digital Text. 2 mill</td>
</tr>
<tr>
<td>1998-2000</td>
<td>After soft platform launches developing pilots alongside Production</td>
</tr>
<tr>
<td>1996-1998</td>
<td>Early prototypes and also developing the platform - eg: MHEG</td>
</tr>
<tr>
<td>1994-1996</td>
<td>The Pioneering Days. Prototypes pre DTV awareness</td>
</tr>
</tbody>
</table>

“Broadband, TV & mobile futures - Natural Evolution”
UK 2000-5 - MEDIA TRANSITION

How/why the BBC helped the UK digital revolution

• Strong competition - namely Sky
• Already a history of innovation and converged services
• £2.7 billion! ($7 billion AUS)
• Government/BBC pals in accelerating digital switch-off
• Freeview and now IMP (integrated media player), cheap, easy steps forward, digital tv and broadband tv
• £2.7 billion! ($7 billion AUS)
• Quality programming - even in the emerging media domain
• Oh and did I mention £2.7 billion…?
UK 2000-5 - MEDIA TRANSITION

Launching Digital

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UK 2000-5 - MEDIA TRANSITION

Digital Text, News & Sport - the no-brainer services
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)
UK 2000-5 - MEDIA TRANSITION

The Big Call to Action
UK 2000-5 - MEDIA TRANSITION

Launching Digital

CROSS-MEDIA JOURNEY

Notes: This is based on a continuing TV show with online and mobile synchronized play-along narrative elements. There are also elements where the experience continues after the show. After the first show it has 3G and broadband elements, after the second only the broadband element remains. There is also a continuing narrative fed out to sms mobiles leading up to each show, with a strong call to action to drive viewers to play each subsequent game.

Stats: SMS in Australia 04-05 6.7 billion messages over 6.5 million phones

“Broadband, TV & mobile futures - Natural Evolution”
The Big Call to Action

• 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
UK 2000-5 - MEDIA TRANSITION

The Multistreams
The Multistreams
UK 2000-5 - MEDIA TRANSITION. Tools

“Broadband, TV & mobile futures - Natural Evolution”
UK 2000-5 - MEDIA TRANSITION

In 2003

• the BBC broadcast over 80 programme-related iTV services reaching 8.5 million viewers
• Between June and November 2003, over 3000 hours of extra video within iTV services
• Viewer response rates averaged 17% or 1 in 5 viewers watching a programme with interactivity available pressed red.
• Every TV genre supported by the BBC - even interactive Shakespeare with Richard II in October
UK 2000-5 - MEDIA TRANSITION

There is demand for interactive content - BBC iTV in 2004!

Interactive TV services 2004

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

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The Cross Media Synchs
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Participation leading to video games

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Participation and ‘transition’ video games
UK 2000-5 - MEDIA TRANSITION

METRICS - MEASURING SUCCESS
UK 2000-5 - MEDIA TRANSITION

% of available audience, BBC iTV 2001 onwards

35-60%
- Wimbledon
- Olympics 60%
- World Cup
- Commonwealth Games
- 6 Nations
- Chelsea Flower Show
- Test the Nation 1

0-19%
- Great Britons
- Antiques Roadshow
- Pyramids
- Saturday Show
- Abyss
- Last Night Proms
- Diners 6%

20-34%
- Fame Academy
- Winter Olympics
- FA Cup
- Golf
- Test the Nation 2

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UK 2000-5 - MEDIA TRANSITION

THE UK FUTURE

• The BBC predicts broadband to 15 and 20 million homes by 2016
• 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, Edinburgh Sep 2005

“Thompson also mentioned that, in its preparations for the emerging on-demand television universe, the BBC is working on search, navigation and branding "with partners like Google and Autonomy," and on "digital rights solutions" with "partners like Microsoft and Kontiki."

Analog switch-off in the UK will start 2008 and end in 2012
Small indy TV producers have announced in the US they can get by with 100,000 subscribers - at the same time networks are cancelling shows on less than 3 million viewers.
PERSONALISATION AND THE LONG TAIL

Too much ‘stuff’ - the mass niche and how to get to content you want?
Find out more on ‘my’ blog www.personalizemedia.com!
PERSONALISATION AND THE LONG TAIL

The Long Tail moves into the on-demand TV world…confidential BBC IMP
BROADBAND VIDEO VIRAL ADVERTISING

• More than 2 million people around the world have viewed the Carlton Draught Big Ad.
• Before the television spot began running on TV, 1 million people had already seen the ad online.
• The Australian TV commercial was originally sent to 4,000 Foster’s employees in July.
VIRAL DISTRIBUTION
• 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
FROM HERE TO THE FUTURE

MOBILE PHONE

• 815 million handsets were shipped worldwide in 2005. 1 billion in 2007. World total already a 3rd of the planet!

• **3G TV video downloads** starting but not mature market yet but streaming news and sport looks promising

• The a £3 ringtone based on the Axel F theme. The fast-growing UK ringtone market is worth more than £300 million a year

• Targeted ad ringtones. Instead of popular music ring-back tones, PromoTel estimates that replacing music content with advertisements would generate close to USD$14 billion in revenue for major telecoms like AT&T, Verizon and Sprint.
THE RISE OF MMORPGS

• **One** example of emerging biz models
• MMORPGS are already at $1bill US in Asia Pacific
• Already games are bigger than box office at $10bill US
• In the next 4 years games will surpass music sales
• Sales of virtual property inside RPGs at $100mill US!

• Mmorpg = massive multiplayer online role player games
FROM HERE TO THE FUTURE

Total MMOG Active Subscriptions (All MMOGs)

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FROM HERE TO THE FUTURE

TRY FOR FREE
On-Line Game Biz Model
• Around 9.5 million hooked players paying $10US per month
• Total revenue approx. $1.2 billion US per year
FROM HERE TO THE FUTURE

Market Share By Genre (Excluding Lineage, Lineage II, and Ragnarok Online) - June 2005

- Fantasy RPG: 85.1%
- Sci-Fi / Superhero RPG: 9.5%
- Combat Simulation / FPS: 1.3%
- Social / Other: 4.0%
FROM HERE TO THE FUTURE

Old ad models
• The average cost of a 30-second spot in “Desperate Housewives” is $439,499, while the same ad in “Lost” costs buyers $333,166 - Advertising Age

New ad models & challenges
• Jupiter Media Metrix predicts that UK iTV advertising will represent $4.4 billion in revenues by end 2005.
• Sky has had a significant amount of success so far with over 280 different interactive campaigns to date that have generated around 1.9m online responses.
• The Multi-modal generation - new users can fit 44hrs of activity into one day
• 30% of all media time is spent exposed to more than one medium at a time
• Cross-media, the new field - Christy Dena’s www.cross-mediaentertainment.com
FROM HERE TO THE FUTURE

NEW FORMS OF ADVERTISING - GAMES

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NEW FORMS OF ADVERTISING - GAMES
FROM HERE TO THE FUTURE

A few tips for emerging media business and creative development

• Make sure you use specialist partners - let them manage their technical distribution
• Don’t give away your emerging media rights
• Keep production values high - even on 2” screens!
• Don’t sign exclusivity deals
• Think mass niche markets
• Use each platform for its strength
• Cross-media is not same thing on each platform - think user journeys
• Personalize the service/s
• Use viral & call to actions whenever possible to cross-promote
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New Fragmented Markets

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CONTROL & CHOICE with audience

Viewers this way

CONTROL & CHOICE with broadcaster & advertiser

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Making prototypes of the future
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Making prototypes of the future - example AFI labs 2004

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Making prototypes of the future - example AFI labs 2004
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Mission

• To create a neutral ground for collaboration between creative teams, visiting mentors and the Australian entertainment industries
• To stimulate innovative digital content creation through incubating innovative projects in partnership with industry
• To develop cross-media production skills of high level creative teams through access to world leading professional mentors
• To disseminate new ideas, research and resources through on-line networks
• To assist production teams get their projects commissioned through the development of ground breaking interactive prototypes
• Develop formats and IP aimed at international and local markets
• To encourage cross disciplinary collaboration on a diverse range of projects
LAMP - Laboratory for Advanced Media Production

Residential One - Sponsored by SAFC

• 8 project teams
• 8 mentors
• 20 visiting speakers and observers
• 8 Australian cross-media prototypes in one week

LAMP@AFTRS

OCTOBER 2005
A selection of project snippets from the 1st week residential

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Residential One - Sponsored by SAFC

Lucky to have representatives from 3 teams here today

• Aiden O’Bryan, WBMC (WA) - Perfect Partner Project
• Jennifer Gheradi, Jag Films (WA) - Georgiana Molloy Project
• Tony Forrest, MovieNetwork - Project Greenlight Australia 2
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Residential One - Sponsored by SAFC

Aiden O’Bryan, WBMC (WA) - Perfect Partner Project

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PERFECT PARTNER
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Residential One - Sponsored by SAFC

Jennifer Gheradi,
Jag Films (WA) -
Georgiana Molloy
Project

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GEORGIANA MOLLOY
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THE WORLD IN 2015

GARY’S PREDICTIONS 2015 - the cycle continues

• TV/Radio/web merge into being just ‘stuff’ from a range of content pipes. TV and radio as a term dissapears from young peoples vocabulary
• UGC - good story tellers become popular, bad story tellers do not - everyone on the planet can tell their stories to the world
• Wireless broadband (WiMax) is your main distribution source to homes and people on the move (oz)
• The converged device is your total personal storage requirements (1TB+), communications and av capture in one - you carry all your pro and personal av with you everywhere, it docks to your large home screen
• RFID devices delivers locative personalization - the mobile device becomes your augmented reality shop window to physical product and media
• Personalized content from many providers uses your one profile - content is targeted at you and you give permission because it becomes highly relevant
THAT’S ALL FOLKS!

Thank you and good morning!

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