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

William Gibson
The global 2002 electronic games market was $40.8 billion, surpassing box office receipts of $39.6 billion. Pwc
So where are the new markets?
NEW ROADS

• 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

NEW ROADS

CONTROL & CHOICE with broadcaster & traditional distribution

Viewers this way
CONSUMERS MOVING FROM SCHEDULED TO ON-DEMAND

Gary Hayes, LAMP Director, Sydney 7 Sep 2005 gary.hayes@aftrs.edu.au
NEW ROADS

2004 Penetration of media ‘types’ in Australia - Bureau of Statistics

BROADBAND THE REPLACEMENT DISTRIBUTION CHANNEL 5 years? 15 years?

Internet BBand PayTV DVD TV 2ndTV DTV Games Mobile

0 20 40 60 80 100
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!**

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

...the new TV, of course
What else happens as consumers move over to always on, connected broadband?
They become content providers and share!
NEW ROADS

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 (.3gp, .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.

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

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NEW ROADS

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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.
They become content providers and share!
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.
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
1. Strong presenter

Call to Action

- the grab

& the tools
NEW DIRECTIONS

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
NEW DIRECTIONS

1. Strong narrative

Call to Action

-the appeal
-the grab
-the tools
• 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
2. Simplicity, clarity and Integration with story -the appeal
3. Reward - part of the appeal
4. Choice - compelling and integrated
5. Audience focus

**Understand** them

encourage

**Participation**

create loyalty

expectation
NEW DIRECTIONS
6. Something unique

parallel
non-linear
tangential
reverse
& more
narratives
6. Something unique
Finally
THINK
Cross
Media &
Platform
NEW DIRECTIONS

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

Main narrative

Response two video feedback

iTV application tracks status

response one video feedback