

Gerd Leonhard, 'Music & Media Futurist', Strategist, Advisor
www.gerdleonhard.com About me
www.gerdleonhard.net BLOG
www.futureofmusicbook.com ...the book
www.musicfuturist.com Predictions on the future of music
www.sonific.com Music Services for Online Media



Broadcasting 2.0 - The Future of Radio, TV, Music & Broadcasting

Presentation for ABU GM November 27, 2005, Hanoi

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About me

- Futurist, Author, Speaker, Advisor, Strategist
- CEO of Sonific (B2B music services)
- 20 years in music & technology, EU, Asia and U.S.
- Music Entrepreneur
- President of advisory agency ThinkAndLink
- Founder / President of MediaThinkTank Alliance
- Strategist and Advisor (formerly Expert Advisor with the EU Commission)
- Co-Author of the book "The Future Of Music"
www.futureofmusicbook.com
- Digital Media Blog at www.gerdleonhard.net



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The Broadband Explosion is driving a huge change:

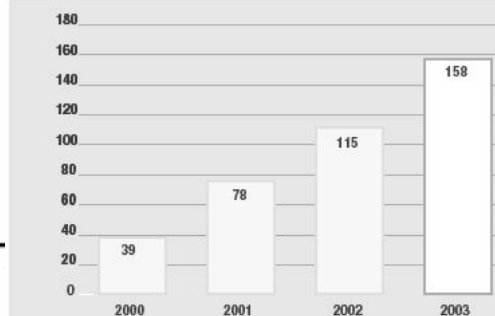
Top 10 Largest Broadband Markets Worldwide, 2004
 (in million and as a % of total households)

1. US	34.3 (29.9%)
2. China	23.2 (6.5%)
3. Japan	17.5 (38.6%)
4. South Korea	11.5 (73.0%)
5. France	6.1 (23.1%)
6. Germany	5.7 (14.8%)
7. UK	5.6 (22.3%)
8. Canada	5.3 (42.7%)
9. Italy	3.8 (17.0%)
10. Taiwan	3.3 (50.8%)

Source: eMarketer, April 2005

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SOUTH KOREAN MOBILE MUSIC SALES (US\$ MILLIONS)



Source: Korean IT Industry Promotion Agency (figures include ringtones, ringtunes and full-track downloads)

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About digitization

- Digital programming requires more expensive gear & devices, both for the user and the producer - but this is changing, quickly
- Audio quality takes a *momentary* backseat to convenience
- Every digital stream / broadcast is a **copy**, really
- In a sea of content, **Search, Programming and Editorial Competence** is crucial
- Content creation tools flood the market space; but is this really a 'democratization of tools of production'...?
- *Digitization is at the root of convergence*

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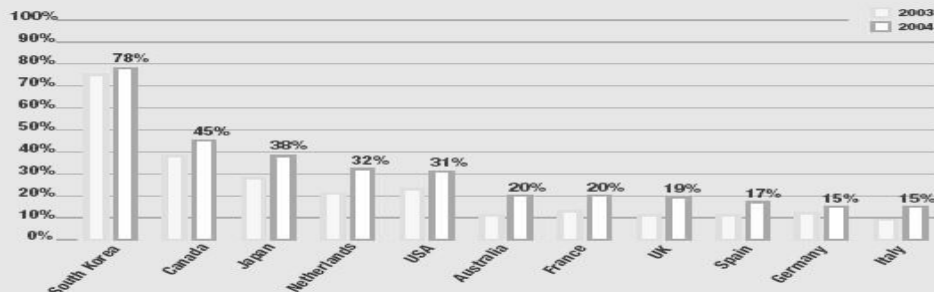
Digitization + Broadband + Social Media =

BROADCASTING 2.0

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Broadband: some consequences for Media

- ⇒ Everyone is connected, most of the time - the options multiply
- ⇒ Everyone is mobile *and* connected - portability is now a must
- ⇒ Everyone has to make more choices - we need new guides!
- ⇒ *Everyone has less time* - we need new filters
- ⇒ Price sensitivity increases - we need new content deals
- ⇒ Copyright becomes 'Usage Right' - 'renting' music & media...



Source: Understanding & Solutions

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Today:

Down *not in all territories... yet

*CD sales *CD player sales *Blank CD Sales *U.S. / Europe: TV viewing (and *advertising*), and time spend listening to radio

Up:

Internet use, Cell Phone sales, MP3 player and iPod sales, Net Radio, Satellite Radio, Digital Radio (DAB, DRM, etc), PC sales, Instant Messenger Use, P2P use, Digital Television sales, Games of all kinds, Blogs, Podcasts, VoIP, Synch Licensing, Performing Royalties...

➤ There are vast differences in each territory, of course, but likely... the ultimate destination is the same: **content like water**

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The impact of convergence

- Previously separated media business segments are fusing
- Competition becomes a broader and more global issue
- Many of us must deal with 'new turfs'
- In the consumer's mind, a converged product must be better AND cheaper than all of its components



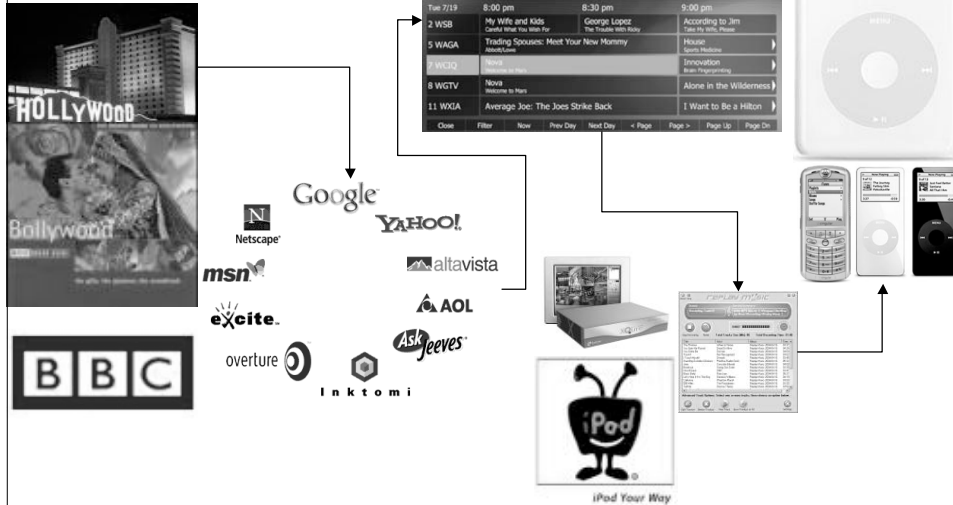
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The Convergence-Challenged



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The future?



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Many Asian consumers appear to be skipping the CD as a technological step in the content footchain

From
Tapes / Cassette Players



To
MP3 players and cell phones
with entertainment content



The new 'CD Player'

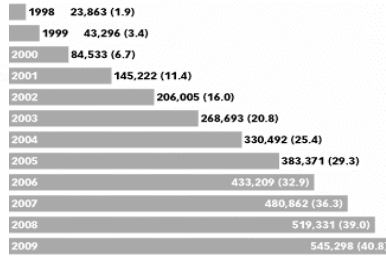


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Facts & figures: Mobile Mobile Mobile!

MOBILE INCREASINGLY IMPORTANT

Mobile Phone Subscribers in China, 1998-2009 (in thousands and per 100 population)



Source: Economist Intelligence Unit, Pyramid Research, October 2004

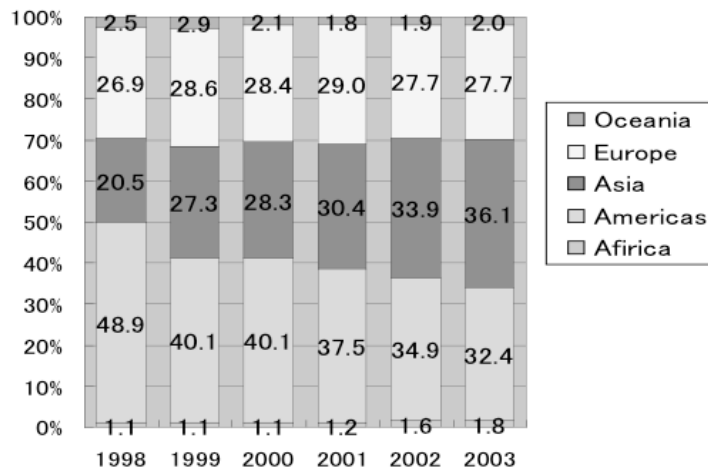
06/03/07 ©2004 eMarketer, Inc. www.eMarketer.com

Country	Mobile phones Millions	Internet users Millions	Ratio	Value
China	334	94	3.6 : 1	42
U.S.	180	201	0.9 : 1	204
Japan	94	68	1.4 : 1	54
Germany	68	42	1.6 : 1	40
UK	54	30	1.8 : 1	26
Italy	54	26	2.1 : 1	15
South Korea	34	30	1.1 : 1	27

Source: Euromonitor, CNNIC, World Bank, Morgan Stanley Research – 2004 year-end data

The decreasing ,weighting' of the U.S.

Area Composition of Internet Users

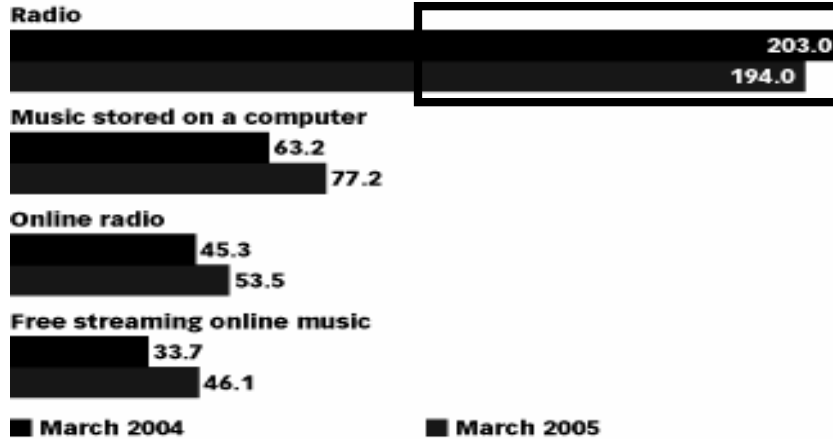


The next .boom is in Asia!

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U.S.: the Internet + PC is ALREADY beating RADIO!

US Consumers' Music Listening Practices, 2004 & 2005 (in millions)



Note: ages 13+
Source: NPD Group, May 2005

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TV To Go is here: Tivo-To-iPod & TivoToGo



- Tivo will enable recorded television programs to be transferred to the Apple iPod Video (this is already working with Windows devices)
- Mid - 2006 ETA
- PSP, too!
- Both can play back H.264-encoded video
- One gigabyte of content formatted for the use of either device should include about 2.5 hours of video...
- 'Season Pass' - type pricing...

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The Internet of Video...?

Warner Brothers announced plans to make a back-catalog of 4800 TV episodes available for a new Internet service, called „in2TV“

- Ad supported / Free Content / Paid
- Using Kontiki P2P technology
- Likely to be delivered via RSS subscription
- Ipod compatible??



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TV <> Internet

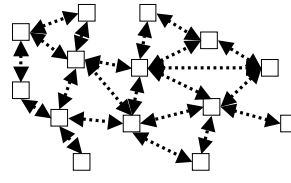
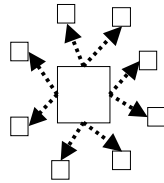
- P2P content distribution clients make it 100x as efficient (Rawflaw)
- Bollywood.tv, which uses EdgeStream's technology, just launched a service that offers more than 730 Indian movies over the Internet....



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The big shift

(Adapted from slides by Kevin Werbach, SuperNova)



Music Industry (top down)	Peer to peer (bottom-up)
Scheduled Television	Tivo / DVRs / Slingmedia...
Media Publishing	Weblogs
Client-server applications	Web services
Circuit-switched telephony	VOIP
Terrestrial radio	Digital Radio (DRM, DAB, HD...)

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'Old' Radio Radio2.0

Satellite / Cable / Tower	Any digital network
Professional DJs and hosts only	+User-generated programs
Local / national (frequency limited)	Virtually local & national, global
Scheduled	Time-shifted
"on the air" / streamed	Recorded / Shared / Networked
Single programs with many listeners	Many large niches
Radio receiver unit	Many devices!
Advertising / Levvy Revenues	Ads / Content / Fees / Upsells...
"Receive" only	Interactive

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'Old' TV TV2.0

Satellite / Cable / Tower	Any digital network (IPTV!)
Professional content only	All types of content
Local / national	Virtually local & national, global
Scheduled	Time-shifted
'Ephemeral' / not 'saved'	Recorded / Shared / Networked
Single programs with large %	Many large niches
TV-Box only	Many devices
Advertising / Levy Revenues	Ads / Content / Fees / Upsells...
Passive	Interactive

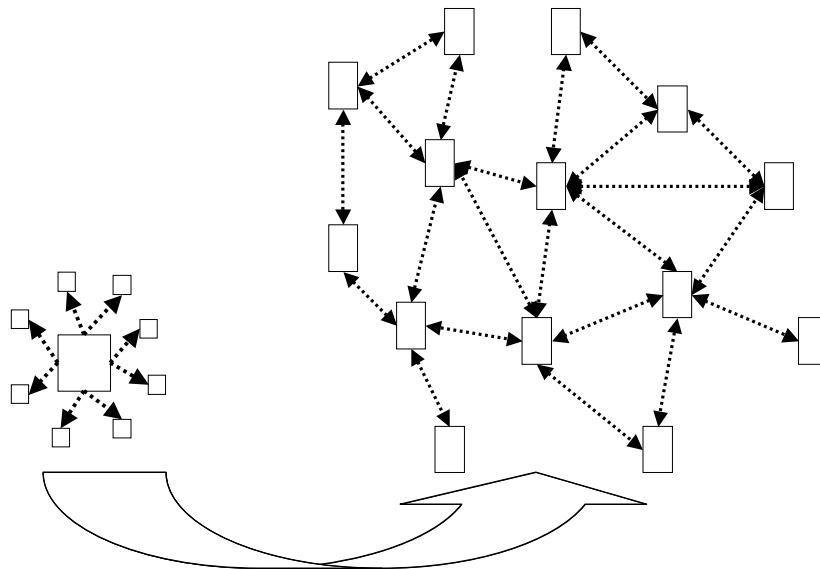
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Old 'content' consumer.....Consumer2.0

Sacrifices to get anything at all	Simply expects <i>everything</i>
Gets little information	Has access to any information
Take-it-or-leave-it pricing	Deals deals deals
Passive / Receives only	Participates & creates
Trusts his sources	Cross-checks several sources

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A central paradigm shift



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Some related mega-trends & contexts

1. The on-demand media lifestyle is here
2. The **end of browsing** aka 'channel surfing' is near, playlisting and recommendation systems are taking over (EPG / IPG)
3. Radio is *finally* unbound (by spectrum or schedule)
4. Consumers are now starting to generate their own content (SOCIAL MEDIA)
5. A mass of niche markets evolves (lowest common denominator concerns becomes irrelevant)
6. Time-shifting *and* space-shifting *and* device shifting become standard
7. 'Long-tail' opportunities explode (>Wired.com)

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Some technologies that will change our world

- Bit-Torrent, Red-Swoosh, RawFlow and other P2P Content Distribution Systems (and Kontiki [BBC], and Edgestream...)
- Google Print
- Wikis & collaborative content
- RSS feeds transitioning to Rich Media Content
 - Podcasting – RSS + MP3 audio + iPod synch
 - Video blogs – RSS 2.0 and RSS Media

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Today's challenges for broadcasters

- **People are taking control over their own media usage**
- “On My time”, i.e. not on scheduled times, is quickly becoming the default mindset
- Not *online* versus offline but “my time” vs. your / real-time.
- Consumers no longer just *receive* but also create / send content!

“I want: what I want, when I want
it, the way I want it.”

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Bottom line # 1:
All content all the time anywhere



Song,
TV Show,
Radio Show,
Book, Video...

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Bottom line # 2: the real value in
Broadcasting is TRUST

In a world of an empowered and connected 'user',
the value is no longer in maintaining an exclusive
hold on anything, and the value *may* no longer in
owning content

The value is in relationships.
The value is in trust.

Broadcasters must now serve
PEOPLE not MASSES.

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Bottom line # 3: people want to be PART of *it*: The Social Media explosion

- Blogs
- Photo- and video sharing
- Online Collaboration
- Online Networking
- Podcasting
- Webcasting
- Online playlisting
- Social bookmarking / tagging
- “Grab this code” embedded objects



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Web 2.0 Examples (audio/video)

- Brightcove.com
- Odeo.com
- OMN.org
- Ourmedia.org
- YouTube.com
- The Orb
- SlingMedia
- Revver



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Revver beta
 GOT VIDEO? GET PAID!

Before you post your videos anywhere online, get a RevTag.

[WATCH](#) | [UPLOAD](#) | [MAKE MONEY](#)

[MOST RECENT](#) | [TOP RATED](#) | [BIGGEST MOVERS](#) | [YOUR PL](#)

Kid steals truck



MySpace Users, Bloggers, Webmasters, Grab this video below!

Grab this Video

[Log In](#) to GET PAID for syndicating this video ([Learn More](#))

Video URL: <http://revver.com/video/1546>
 For email or hyperlinks

Video Player :
 Add a video player to your site (MySpace, Blogger, Friendster, etc.)

```

<object codebase="http://www.apple.com/
qtactivex/qtplugin.cab" width="320"
classid="clsid:02BF25D5-8C17-4B23-
BC80-D3488ABDDC6B"
height="272" <param name="src"
value="http://revver.com/broadcast/1546/
video.mov" /> <param name="controller"
value="True" /> <param name="cache"
  
```

Some sites such as MySpace won't allow you to use <object> tags. If you find the above code doesn't look right, try just using the <embed> tag:

```

<embed src="http://revver.com/broadcast/
1546/video.mov" pluginspage="http://
www.apple.com/quicktime/download/"
kioskmode="False" qtsrc="http://revver.com/
broadcast/1546/video.mov" cache="False"
height="272" width="320" controller="True"
type="video/quicktime" autoplay="True"></
embed>
  
```

Video Thumbnail:
 Add the video thumbnail to your site (MySpace, Blogger, Friendster, etc.)

```

<a href="http://revver.com/video/1546"
target="_blank"></a>
  
```

Download Entire Video : [Download Entire Video \(44.42 MB | 07:32\)](#)
 Distribute on P2P file sharing networks

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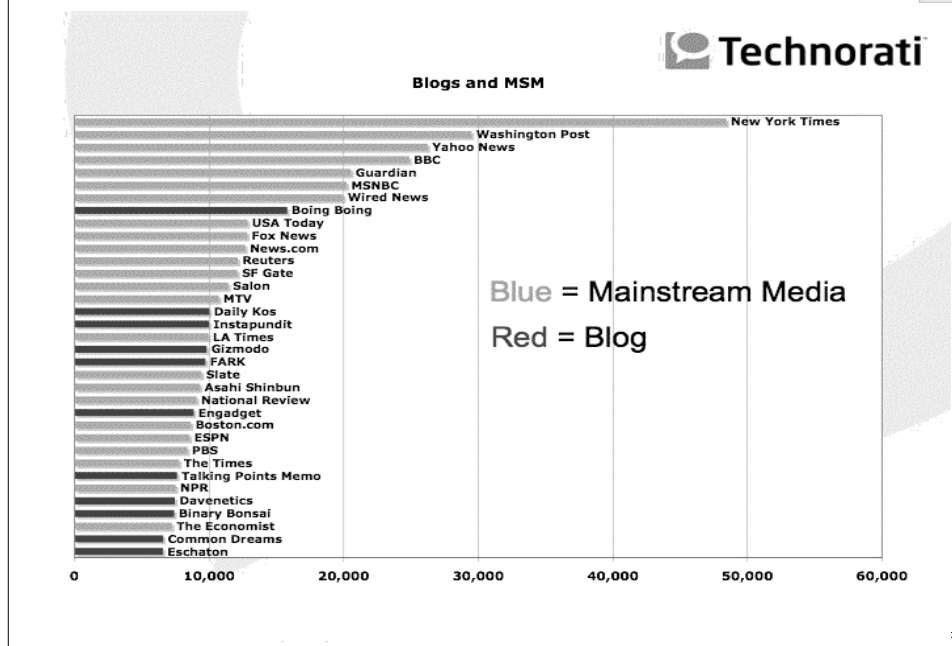
The Social Media Explosion

Online Photo Sharing	65 Million Users Worldwide
Website Creation	300 Million Website Creators / year
Online Video Sharing	51 Million Users By 2008 (Est.)
Blogs/Social Networking Sites	34 Million Users Worldwide
Podcasting	100.000 Podcasters by 2006

Blogging, podcasting & RSS
 Innovations that will change how you communicate - forever

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Why is this important for broadcasters?



People are no longer just receivers - they are also senders, they want to interact, and to participate.

- an important function of 'Broadcasting 2.0'

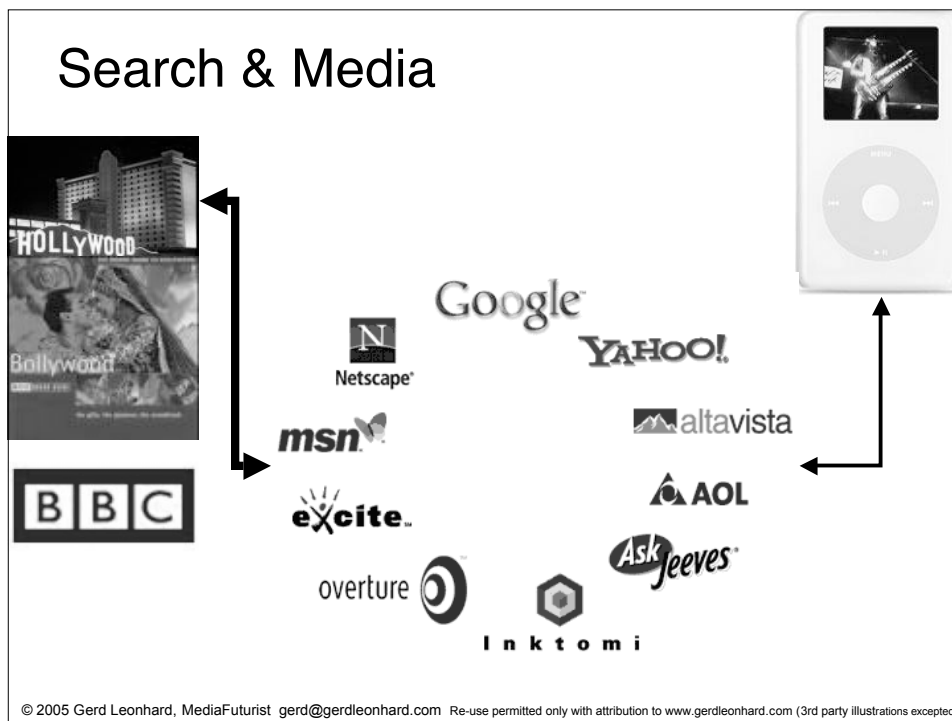
Bottom line #4: Search IS Media

Search companies become media companies

- 'Anything Anytime Anywhere' user-mindset gives more power to Electronic (or Interactive) Programming Guides (EPGs and IPGs), which are of course based on search
- Yahoo is becoming the '5th Network' (in the U.S.)
- Once again, personalization and interaction RULE
- Most users will search first, then listen, making the search engines a gateway for media
- Google becomes the next MSFT+ VIACOM

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Search & Media



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Bottom Line # 5

Broadcasting IS Distribution

- Terrestrial broadcasts have always been recorded by users
- On a computer or a digital network, every stream IS a copy, regardless of how we 'dress it up'
- Broadcasters already have the eyeballs / ears of the public, so they make the perfect 'next generation'-retailers
- Professional programming skills matter even more
- "Renting Music" models like Napster To Go, XM To Go, and others already exist in the grey zone between renting and owning

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So..is this still a RADIO???

- ▶ Records DAB Radio and transfers as MP3s
- ▶ Rewinds / forwards



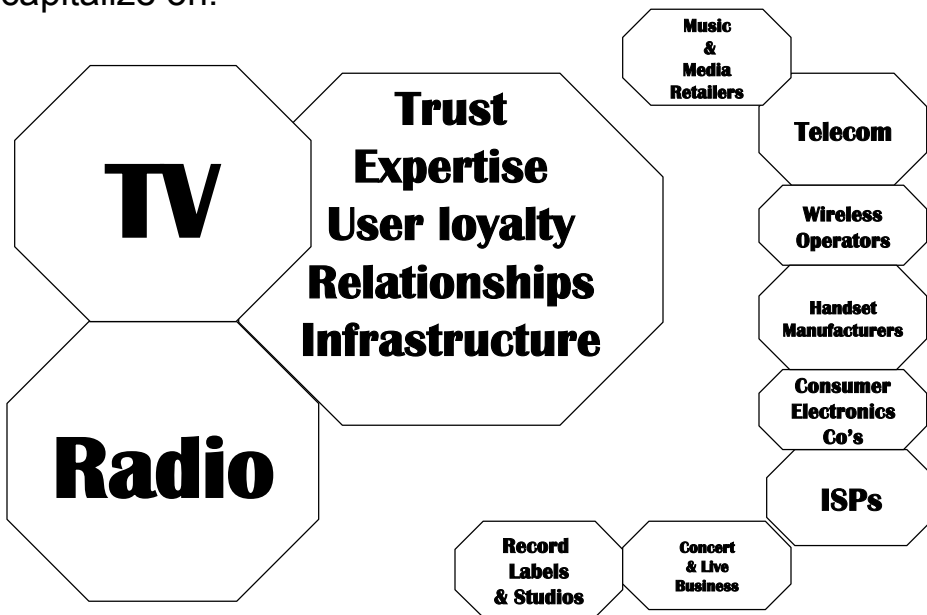
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Broadcasting 2.0

- The easiest, most efficient and most ubiquitous way to receive **'feels like free'** content
- For many people, the first step into media consumption, and, hopefully, interaction
- Guaranteed diversity and multiplicity
- **A Content Utility**
 - Content flows like water, *everybody uses everybody pays*
 - Many 'content upgrades' are available

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Broadcasters offer some very unique values to capitalize on:



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The times are a-changing



Music on

- MY Schedule
- MY Device
- MY Subscription
- MY Playlist

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Mobile Music & Media Keywords

- Personalization (its ME)
- Self-Expression (,look what I have')
- Fashion (,cool!')
- Participation (,I can do this, too')
- Communication / Sharing (,check this out')
- Spontaneous purchasing
- Bookmarking / Tagging
- Micro transactions / direct billing

Broadcasters must embrace content delivery to mobile devices,
and take full advantage of their established market position

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A Definition of the Long Tail

In a digital entertainment ecosystem it becomes feasible that the total, combined number of sales of the *less-popular products* actually surpasses the total # of sales of the top-level products, because

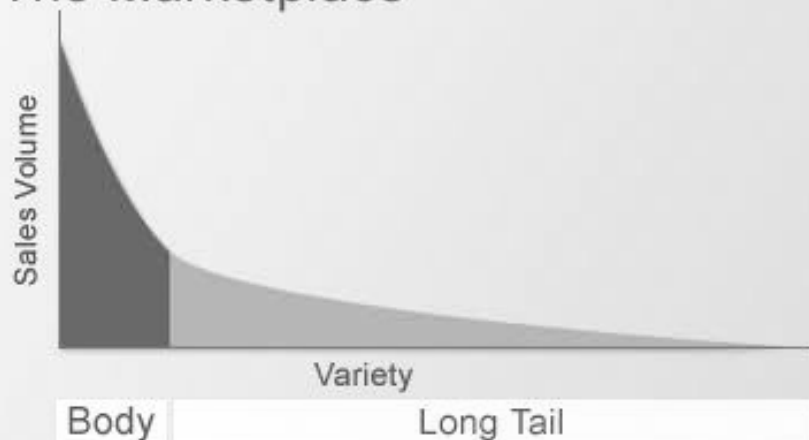
- ☯ There are no shelf-space issues
- ☯ Distribution is no longer a gate-keeping factor
- ☯ Every business can be global
- ☯ Lifestyle-Marketing and Viral Marketing become real options, at very low cost (see: Google ad-words)

>> **Read: *Wired.com* "The Long Tail" by Chris Anderson**

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A crucial network economy effect, and new business paradigm: The Longtail (Chris Anderson – WIRED)

The Marketplace



PODCASTING

Podcasting, a portmanteau of Apple's "iPod" and "broadcasting", is a method of publishing files to the Internet, allowing users to subscribe to a feed and receive new files automatically by subscription, usually at no cost.

en.wikipedia.org/wiki/Podcast

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Podcasting... about to eat Radio's lunch?

... CBS ([VIA](#)), Clear Channel Communications ([CCU](#)), and Walt Disney ([DIS](#)), are lining up their podcasts right next to those from indies. Tech giants America Online, ([TWC](#)) Apple Computer ([AAPL](#)), and Yahoo! ([YHOO](#)) are rushing in with aggregation services that collect thousands of podcasts in one place, laying the foundation for selling shows and ads.

iTunes offers 15,000 podcasts, and listeners have signed up for 7 million subscriptions.

.... Sequoia's Kramme thinks podcasting could siphon \$1 billion to \$2 billion away from the \$30 billion radio advertising market in three to five years



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Really?



Podcasting. The next generation of radio.
With iTunes 4.9 you can now browse, find, sample and subscribe to thousands of free radio shows — called podcasts — then sync them to your iPod and listen anytime, anywhere.

Step 1. Find your favorites. Free.
Browse, sample and subscribe to thousands of free podcasts from the iTunes Podcast Directory.

Step 2. Manage podcasts.
Organize, rate and let iTunes update your growing podcast collection automatically.

Step 3. Sync shows to go.
Download podcasts to your iPod and listen to your favorite shows anytime, anywhere.

Podcasts
General iPod Podcasts Audio Importing Burning Sharing Store Advanced

Check for new episodes:
Next check: Today, 5:00 PM

When new episodes are available:
Keep:

Set which Podcasts are copied to your iPod:

Internet kills the radio star
BY ANDREW CLAYTON
In an effort to avert the fate of the once-hip world of podcasting, a CD network has now set up a radio station on the Internet.

THE FUTURE OF MUSIC

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‘Renting’ music is here

The ability to obtain large catalogs of ,rented’ music without having to pay for each copy of each song (,unit’)

- Yahoo: \$5.99 Napster / Rhapsody: \$14.99
- Close to ,feels like free’ (and soon, this *will* be free / ad or bundle supported), but music is not **actually** owned
- Exploration and discovery is made easy
- May ultimately eradicate need for filesharing
- Becomes a commercial version of a public *music utility*
- Is a question of lifestyle, age, location... And FASHION
- The user DEMANDS lower costs yet better features

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Time shifting of music is here. Now.



*The ability to listen to music **broadcasts** without being actually connected to the broadcaster at the time of listening*



- XM To Go devices



- Napster to Go / Yahoo Music Unlimited / Rhapsody



- Timetrax / Replay Music / Radiotime (Stream Recorders)



- DAB / HD Radio devices



- Grouper / Mercora etc



- BBC Music player



- Podcasting (Audiofeast?)



- Tivo + the Music DVR

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Buying music > Renting Music

- Consequences

- Prices drop dramatically
- Almost all users (re-) engage
- Bulk / Flat fee / blanket deals emerge
- ‚Sharing‘ is enabled
- Broadcasters ‚rent‘ music, too!

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