

# Setting the Bar for Online Video 2.0: Best Practices You Can Use Today

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Setting the Bar for Online Video 2.0: Best Practices You Can Use Today

THURSDAY FEBRUARY 28th, 2008

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Questions Speaker Bios

SUBMIT

Broadband is an Open Video Delivery Platform

Video Servers (e.g. Yahoo, CNET, MLB)

Internet

Broadband Network

Television

Cable modem or DSL

Computer

Portable Video Player (e.g iPod, Zune)

Video Servers (e.g. YouTube, NYTimes, Budweiser)

Source: Broadband Directions LLC

BROADBAND DIRECTIONS

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Video NGize

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Questions

Speaker Bios

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SUBMIT

### 3 Disruptions of Broadband Video

1. Established video providers can go "direct-to-consumer"
  - "Cable bypass" – 1<sup>st</sup> time to get video directly to audience
  - New economics based on retail, not wholesale model
2. New broadband video distributors can establish value
  - Define new services that are aligned with consumer behaviors
  - Change "basis of competition" among market participants
3. New video-focused market entrants can emerge
  - Numerous types of companies enter video market
  - New broadband/online-centric economics



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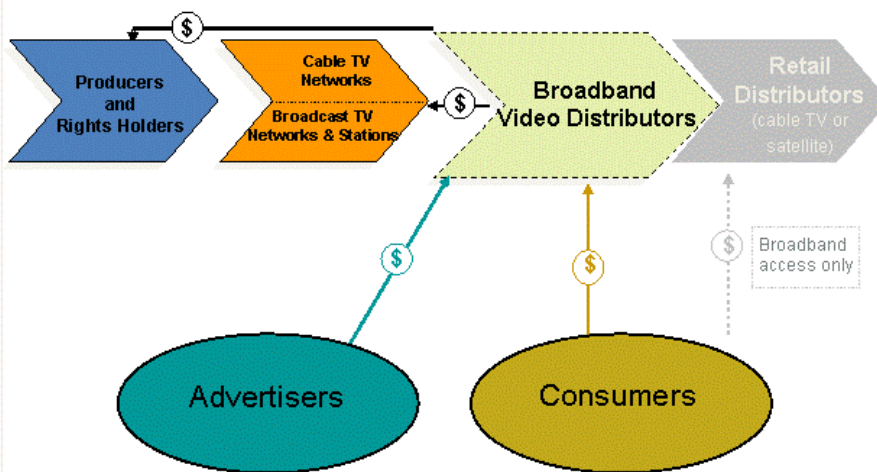
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## 2. Broadband Enables New Video Distributors



Source: Broadband Directions LLC



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3. Broadband Enables New Video Providers

Producers and Rights Holders → Cable TV Networks / Broadcast TV Networks & Stations → Broadband Video Distributors → Retail Distributors (cable TV or satellite)

New Video Providers (startups, incumbent non-video media or marketers)

Advertisers → New Video Providers → Broadband Video Distributors

Consumers → Broadband Video Distributors

Consumers → Broadband access only

Source: Broadband Directions LLC

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Future Video Distribution Value Chain?

All Video Providers → Broadband Video Distributors

Advertisers → All Video Providers

Consumers → All Video Providers

Advertisers → Broadband Video Distributors

Consumers → Broadband Video Distributors

Source: Broadband Directions LLC

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## 4 Key Trends to Watch

1. Dominance of ad-supported business model
2. Explosion of consumer video choices
3. Brand marketers as content creators
4. Video syndication and indie/user-driven distribution

### 1. Dominance of Ad-Supported Business Model

- Near consensus around ad-supported business model
- Media companies know advertising model
- TV ad-skipping and audience fragmentation
- Consumers love free
- Online advertising booming
- Short form dominates
- Delivery quality matters less when consumer not paying

## 2. Explosion of Consumer Video Choices

	Type of video producer	Examples
INCUMBENTS	Broadcast networks	ABC, CBS, FOX, NBC
	Local TV stations	Tribune, Gannett, Hearst-Argyle, Belo
	Cable TV networks	MTV, ESPN, CNN, USA, Discovery
	Film studios	Paramount, MGM, Universal
NEW ENTRANTS	Online publishers	CNET, Edmunds,
	Portals	AOL, MSN, Yahoo
	Newspapers	NYTimes.com, WSJ.com, USAToday.com
	Magazines	Forbes, FastCompany.tv, CondeNet
	Independent video producers	Next New Networks, Vuguru, TMZ, Turn Here, IMG, Revision3
	User-generated video	YouTube
	Brand marketers	Kraft, Heinz, J&J, CIT Financial, AMEX

### What's Driving Video Proliferation?

- Costs to produce plummeting
- Minimum quality bar is lower
- Distribution options opening up
- Online economics favor niche approaches

### 3. Brand Marketers as Content Creators

- Brand marketers making unprecedented forays into content creation
- Key motivator is improved engagement
- Moving beyond 15 and 30 second TV ads to reach audiences
- Initiatives fall into 2 main buckets: original entertainment/information videos and UGC contests

### 4. Video Syndication and Indie/User-Driven Distribution

- Shift from destination to syndication
- More important to reach eyeballs than to aggregate them
- Social networks and video platforms playing huge role
- Indie producers and users drive new distribution forms



## #1. Video 2.0 experiences are permission-based

Viewers decide when to tune in, the content they view and the duration of engagement.