



# Vision document

## 2030 and beyond

## **Eurotransmedia Vision Document 2030**

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# Executive Summary

## Context

Thirty years ago, the digital revolution hit the audio-visual industry, leading to three major upheavals: content dematerialization, a deep modification of standard practices, and the coming of age of the digital convergence.

Today, the deployment of Internet and the liberalization of telecommunications networks have increased the number of distribution and diffusion channels, and the ways to access the content. “Audience media” have had to deal with disruptive “access media”. The passive audience became active, interactive, and even part of the production process; multiplying multi-platforms, mobile, and community-based practices (through social media, blog, forums, etc.). Users, producers, broadcasters, and developers are at the crossroads of digital

convergence, which will stem from the interoperability and interconnection of technologies, skills and delivery channels.

Companies working in this sector encompass more and more interconnected fields. In the same manner, they address the changing cinema, TV, advertising, corporate, and transmedia markets. Traditional media players are being met by “digital natives”, coming not from the audio-visual but from the Net economy. At ease with technology, these newcomers are promoting new forms of creation and content production, devised from scratch for multi-screens.

In this context, opportunities go both ways. In order to adapt to the digital market, and answer the audiences' expectations adequately, traditional stakeholders must think in terms of interactivity,



multiple channels, transmedia, connected TV, and so on. They need news skills that they will find in Web start-ups: Social media, user experience, gamification, recommendation, and community management are some of those skills that pure players will be able to monetize. Conversely, those pure players need to familiarise themselves with the concepts of storytelling, editorialization, and the more traditional workflows (for fiction and documentary production). They also need to satisfy the quality standards of the broadcasting industry.

## Visions

On the one hand, the success of transmedia content will be based on the ability of its creators to manage many technological, economic, and artistic skills in an environment in perpetual evolution.

On the other hand, transmedia content creators will have to meet the expectations of consumers, who increasingly want ATAWAD (Any Time, Any-Where, Any Device) content<sup>1</sup>. Through different tools, consumers will have more and more influence on the creation of contents. They are no longer spectators but participants, with no turning back.

According to NEM, a cluster of European media clusters, “Provide digital infrastructure, and amazing innovation will follow”. The technologies, somehow, determine the borders of creativity.

In that respect, the emergence of assisted access to content, enhanced by the mainstreaming of storage and management of content solutions in the “cloud”, will offer opportunities of access to culture and its enrichment from diverse communities as has never been achieved before. Indexing of content associated with artificial intelligence tools will allow access to undisclosed desires; these new services will be designed through simple analysis and profiling of users.

We should also consider the increasing possibilities offered by translation and geolocation technologies:

- The emergence of expert systems with simultaneous translation features and indexed voice libraries according to the morphology of the characters, for example, that will allow applying to many media in all languages, in real time.
- The geolocation feature will adapt the content regarding language and/or culture.
- The combination of the above features will enable various combinations of translated and geolocated content with customised advertising, meaning that communication will be automatically adapted to the expectations and culture of its public.
- New financial models and production patterns will appear to benefit from the global distribution of content that is customised locally in real time.
- Connected objects whose actions will be designed and incorporated into stories. They may integrate sensors, monitors, microphones, speakers, cameras, video projectors, etc.
- Robotics, programming, and wireless synchronization,
- The toy industry: toys connected with other linear or interactive media.
- New types of “digital manuals” involving augmented reality from mobile phones or tablets, the pico-projector combination, including LED and laser camera to “augment” the real situation.
- The relationship with traditional media and new immersive environments, personal or shared. Documentaries will be increasingly synchronised in augmented reality, added on real environments.
- Individual support: access to customised content based on our own movement within immersive worlds: e.g., I travel within the infinitely large or small world and I continuously have access to contextual elements of my position in space and time (real or virtual).

Finally, in terms of consumers’ expectations, we should notice an increasing demand for immersive

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<sup>1</sup> Source: NEM Vision & SRIA Position Paper.

and interactive content. They want a more engaging audio-visual experience that is ever more “like being there”. 4K TV and AR/VR devices will contribute to the delivery of such experiences, as the possibilities are incredible. 360-degree environments and innovative storytelling platforms could notably revolutionize animated films, documentaries, and live-action experiences.

As a conclusion, the success of a technology’s development will depend more and more on either its acceptance by the users/citizens or its “transparency” (users want a service that works and do not care about its embedded technologies).

In terms of business, transmedia content is a chance for the European Union to get rid of its old way of thinking. Even if protecting its local and cultural content remains an issue, transmedia means the creation of worldwide communities whose consumption does not depend on cultural barriers but is based, rather, on artistic universes. Therefore, Europe will have to tuck about and partly switch from a local to a global perspective.

New sectors such as healthcare, lifestyle, and the consumption of non-media goods and services becoming increasingly digitised with each passing day. This marriage between digital sectors and other social, industrial, or economic sectors should be by far the best new business opportunity for transmedia content and storytelling. In the meantime, many of the more traditional sectors are approaching transmedia through marketing activities. This is where the most successful transmedia content can be seen.

In this changing environment where traditional content producers are largely supported by the

public authorities, the transmedia producers will increasingly rely on investment from the private sector. Thus, supporting the creation of innovative financing tools should be a key element for the development of the transmedia industry. Tools such as crowdfunding platforms should evolve in the future into even more powerful and influential tools. Today they seem to be the basic building blocks of the new digital economy for the creation of transmedia content.

In the recent past, the video game industry – a digital, cultural, and innovation driver – has had to clear the same hurdles as the transmedia industry. Video games engendered new business models, created innovative content, and spawned unique services that are still driving ground-breaking technological discoveries, leading the way for many other sectors. Hence, if the innovations of the video game industry have had an impact on human resources as it spawns new crafts and new needs, the revolution led by the transmedia creation on content will have an ever bigger impact on creative human resources, for the latter will have to reinvent the way they are working. From creating in isolation, which is generally the rule in Europe, they will likely have to turn to teamwork in order to face all the characteristics of transmedia creation.

Nevertheless, creating content for several media in the meantime is a totally new challenge, as it has never been addressed before. This has a major impact on creation, as the rules of creation must change. Indeed, the creation of a homogeneous artistic universe that will compose, as a whole, a bankable content on several devices is much more rigorous in terms of knowledge and will involve a great many competences.





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# 1. Eurotransmedia Overview

This Strategic Vision Document describes the expected future of transmedia — **where Europe wants to go and why**— taking account of the international perspective. It will contribute to positioning the European industry on the globalised transmedia market.

The vision shows that the success of transmedia content will be based on the ability of its creators to manage different skills, starting with technological ones (although in an environment in perpetual flux), but also and especially economic and artistic skills. On the other hand, the success of transmedia content will also be based on the talent of its creators to meet the expectations of consumers, who increasingly want ATAWAD (Any Time, Any-Where, Any Device)<sup>1</sup> content. Through different tools, these consumers will have more and more influence on the creation of contents in the future.

The consumer is no longer a spectator but a participant. In this new framework, how the European transmedia talents will be able to contribute to the expansion of the European culture as a whole and to the building of a new industry is a crucial question.

The document is intended to become a reference document:

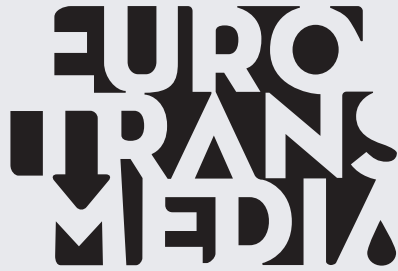
**For public policies** on the national, regional, and European levels: list of potential research topics and regulations to be addressed by public policies.

**For the media market:** overall overview of the field, identification of emerging markets and opportunities, etc.

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<sup>1</sup> Source: NEM Vision & SRIA Position Paper





### THE EUROTRANSMEDIA PROJECT INTENDS TO:

- Integrate key problem areas in the EU by uniting research efforts to get rid of the remaining technological barriers that still hamper user creativity, user content editing, interoperability, portability and new editorial strategies (which can be seen as the future of the media industry). It will tackle technological, scientific, organisational, and economic challenges for research and innovation for the European media industry;
- Adapt a new value chain to the new economy, in which the user is both a consumer and a producer and practices are nomadic and ubiquitous;
- Defragment research through the development of a common trans-regional research agenda and of the associated Joint Action Plan integrating regional specifics based on the common knowledge acquired by six key European research-driven clusters.

### THE PROJECT WILL DELIVER

- A Vision Document targeting 2030 that identifies areas of interest for research, innovation and collaboration in the coming years;
- A Strategic Research Agenda to identify areas that need more research and innovation investment to reach the objectives described in the Vision Document;
- A Joint Action Plan identifying common activities to be launched among project partners in the project period.

### THIS VISION DOCUMENT

The Vision Document aims to describe the expected future of transmedia, i.e., where Europe wants to go and why, taking account of the international perspective. This strategic document will contribute to positioning the European industry on the globalised transmedia market.

The document is intended to become a reference document:

- **for public policies** on the national, regional and European levels:  
list of potential research topics and regulations to be addressed by public policies
- **for the media market**:  
overall overview of the field, identification of emerging markets and opportunities, etc.

## 2. Current Situation

### Introduction

Transmedia is a constantly evolving reality. Its definition came from the academic world and was at first one of the ways to describe content distributed through several media simultaneously or sequentially.

Marsha Kinder, professor of Critical Studies at USC School of Cinematic Arts, Critical Studies, coined the term “transmedia” in 1991. At the time, regarding entertainment franchises, she spoke of “transmedia super systems...[that] position consumers as powerful players while disavowing commercial manipulation.”<sup>2</sup>

Jenkins’s definition has proven to have great longevity and was also our stepping-stone when we looked at transmedia today. But due to technical changes first and foremost and modifications in distribution and formats, several elements of interaction, audience development, and influence have changed at a tremendous pace since 2003.

The three most important new ingredients on the transmedia plate are without a doubt the social

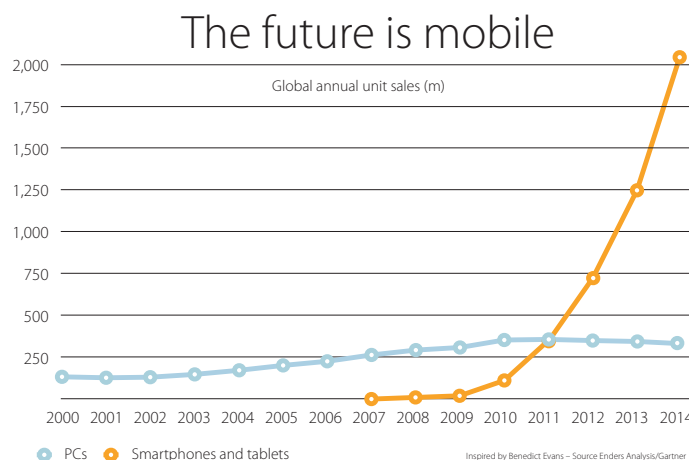
media, portable devices, and the user. The audience no longer takes a backseat, but is rather part of an ongoing dialogue with creators and producers.

Now that Facebook, Twitter, and Instagram are reaching billions of people every day and smartphones and tablets are invading our everyday lives, transmedia is no longer something “nice to have”. Rather, it is quickly becoming something that we “need to have” for our media industry to survive.

With a real start date around 2011, a lot of traditional entertainment producers as well as numerous more agile digital world-savvy producers began to embrace the storytelling techniques used in transmedia. The need for a new communication form that is more native to networked digital content and spread over all new communication channels emerged.

Within a few years’ time, transmedia found its way out of the research world into the real world of business companies and people’s mobile devices. More and more companies are using transmedia strategies or hybrids thereof in free and innovative ways, not caring particularly if that could be called transmedia or not.

2 Kinder, Marsha (1991). *Playing with Power in Movies, Television, and Video Games: From Muppet Babies to Teenage Mutant Ninja Turtles*. Berkeley and Los Angeles, California: University of California Press. pp. 38, 119. ISBN 9780520075702.



Those hybrid strategies are based more often than not on classic intellectual property and stories that are conveyed through one medium and then spread to others. Examples are easy to find in TV shows, alternative reality games, and advertisement and marketing campaigns.

## The audience has become a player

The audience's new influences have huge impacts on the creation of content and on the relationship between the consumer and the creator.

First of all, from the generational perspective, the rising audience of young people has a new feature: it is not composed exclusively of viewers and listeners. Increasingly, audiences are composed of players who nourish, transform, and give meaning to transmedia projects.

Therefore, compared with established expressive and communication practices, this will of the target audiences to be involved and to participate actively is an upheaval for all designers. And this upheaval is causing intense research on topics that focus on the links between the art of storytelling and the management of interactivity and the human-machine interface. In the jargon, to summarise this active participation of the audience, we talk about "User-Generated Content" (UGC). UGC is a big issue that is already the subject of research since "gamification" invaded the cultural sphere.

Secondly, transmedia realization takes account of the layout and operation of several media. The ingenuity with which these arrangements are designed is fundamental to the success of a transmedia project. But the complexity of this process arrangement is increased by the rapid changes in audiences' choices and behaviours.

These comings and goings between designers and users are the origin of "Living Lab" and "Fab Lab" concepts. In the field of transmedia (as in other industries that rely on digital technology), researchers need to integrate user behaviour quickly or run the risk of addressing issues that are no longer relevant when the research is under way.

Finally, the audience has many other impacts on research. Topics such as the digital tools of creators, the production and financing processes, and the storytelling process are already the subject of research.

## How does the media industry in Europe and beyond involve the audience in 2015?

### CURRENT GLOBAL MEDIA CONSUMPTION

The Global Media Consumption analysis conducted by the Eurotransmedia Consortium focused on the partner countries but identified also the most



#### Global Media Consumption – Europe

	SPAIN	UK	FRANCE	SWEDEN	BELGIUM	NETHERLANDS	ESTONIA
Interviewees	14,636	13,403	11,500	7,093	4,500	4,025	3,001
Unweighted audience	30,841,000	46,988,000	40,000,000	7,134,000	7,227,900	11,655,300	901,600
Age range	15-64	15-75	15-64	15-64	15-64	13-64	15-64



#### Global Media Consumption – World

	CHINA	USA	JAPAN	SOUTH KOREA	ISRAËL
Interviewees	62,520	34,532	7,564	5,000	4,173
Unweighted audience	279,222,000	227,215,000	79,200,000	36,992,000	5,600,000
Age range	12-64	15-74	15-64	15-69	13-64

prominent extra-European transmedia markets, namely, China, the USA, Japan, and South Korea. The United Kingdom, Israel, and the Netherlands were also included because they are the birthplaces of key transmedia initiatives.

## AN OVERVIEW OF TRANSMEDIA TODAY

In the Eurotransmedia partner countries, transmedia storytelling is in its infancy, and it is not proving easy to “think in transmedia terms”, especially for the traditional monomedia companies.

Public television in most European countries has been the initiator of various experiments and transmedia storytelling projects. For example in the United Kingdom, they have taken up the challenge, taking both the significant decline in their audiences’ numbers and their ageing into account. They are now diversifying their audiences with innovative methods. As in most European countries, the transition to transmedia was initiated via public channels and was also meant to trigger emulation among other actors.

The problem is that in Europe the economic model is not yet sufficiently developed by sources other than public funding. It has not yet fostered independent private activity. In France, the principal economic model is supported by public funds, which favours public and/or State-subsidised channels. Given the lack of business models and profitability calculations, private actors are either

reluctant to get on board or voluntarily take the risk of investing in the field.

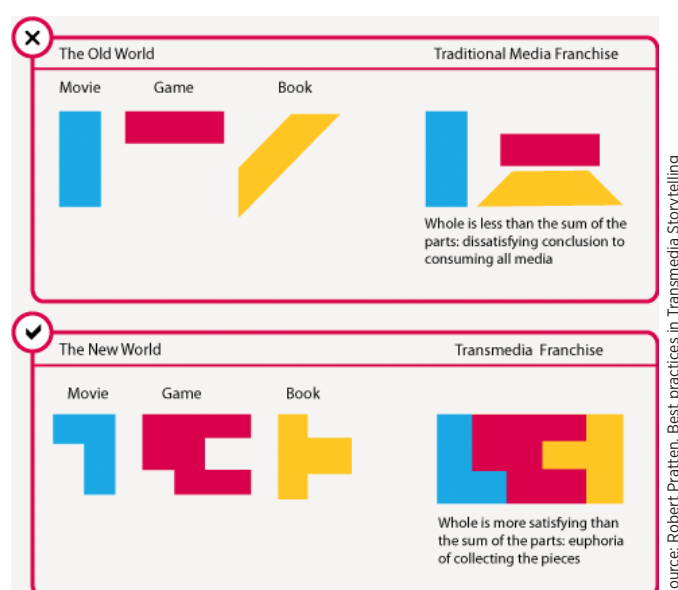
It has proven difficult to break with the conventional logic of audio-visual production designed for the linear environment and change in favour of the transmedia concept.

Copyright issues are also very delicate in France, yet remain the key to transmedia work, for French authors are extremely fussy about adapting their content. France’s transmedia focus is mainly on sharing social content with a fan base.

A different model is the one of Japan. The most influential factor in the development of transmedia comes from Manga culture, a world that, by definition, is adaptable and responsive. The concept of copyrighting is fundamentally different from the European one: The author is aware of the fact that his work will be adapted. In addition, because of various cultural characteristics, projects are distributed on different levels and through different channels.

One of the conclusions of the Global Media Consumption analysis is that there really is an interest in transmedia in the young generation and education.

For example in Estonia, with Internet access almost anywhere and almost free, people are very fond of digital content. The younger people in Estonia, as



in many other countries, are the society's leaders in using social networks actively, multi-tasking, and consuming content.

The same phenomenon exists in China. Chinese youth, who are eager to share and looking for empowerment, are creating an emulation of User-Generated Content. The first activities of transmedia storytelling began via blogging, a very popular activity in China.

Whereas China is still a bit behind because of the extent of censorship and state control, South Korea has quickly established itself as a pioneer in the total integration of all digital and traditional media. The intensive use of mobile phones for all kinds of content influences the type of content developed by mobile operators and the entertainment industry.

Education in South Korea was rapidly recognised as one of the fundamental pillars of development. Together with widespread and rapid high-speed Internet adoption, educational content was rapidly developed in a single generation: Classes are advanced and improve the creation of quality

content that is directly adapted to emerging technologies. These classes are developed by leading educational institutions.

The South Korean audience is very involved and people organise themselves to create their own content. User generated content is spontaneous. Blogs, whether cultural or political, are places where you can express yourself. Every element is social, commented upon, and shared by the audience.

The South Korean entertainment industry and related products are extremely structured and organised to produce diversified content. This content is created mainly in order to attract demanding and highly engaged youth. As in many other countries, gaming is a social pillar for entertainment and is organised in strong communities.

For another good example of transmedia use today, we must turn to the United States. The offer there is abundant and the country's TV system is extremely competitive, coupled with advertising saturation. Therefore the various TV networks have invested in creativity to build strong, appealing





stories that capture most of their audience. The U.S. audience is extremely fond of diverse, engaging content. Communication on social networks and content sharing are the pillars of American culture.

The American transmedia business model was initially built on existing content. The channels were diversified to be integrated in early stages of the project, such as design and production. The absence or small amount of subsidies forces the actors to develop an economically viable model. Conglomerates and partnerships abound and advertising has an important role in providing additional income.

Back in Europe, Sweden, like the Netherlands and the United Kingdom, is among the most developed countries in the world in terms of new media usage, on a par with Canada and South Korea.

In terms of interactivity, Sweden has a leading position. Many examples paved the way for a transformation in television use. Starting with the 2007 programme “The Truth about Marika”, Swedish transmedia blurs boundaries between reality and fiction, integrates diverse experiences through different media, and promotes viral distribution of content.

The pioneer programme “The Truth about Marika” was a televised reality show allegedly based on real events. The TV show started with a dispute based on proven facts, put the accent on social

experiments, and included fans and fan generated content within the story universe. Its success led to many other textbook cases in Sweden. Sweden along with Belgium is also at the origin of the successful “The Spiral”. “The Spiral” is a co-production between SVT (public broadcaster in Sweden) and VRT (public broadcaster in Belgium). Six European countries joined for broadcasting and introduced LARPing, which stands for “Live Action Role-Playing”, a form of role-playing game where the participants physically act out their characters’ actions.

The Netherlands is extremely well positioned in the digital development of its economy. It scores among the highest in the world, especially for Internet penetration and broadband connection. The development of the Internet culture has been part of government policy since 2002, and the Dutch are the creators of the term “e-culture”.

The Dutch media landscape is very well structured through the establishment of umbrella organisations and because of the many high-level stakeholders involved in content creation and distribution. Furthermore, the strong focus on innovation and important development of specific business stimulated the emergence of specialised skills and collaboration. The Dutch are extremely connected, fond of media, and fond of content. They also tend to adopt a multi-screen behaviour and are constantly looking for different content on different channels.



### 3. Facing new challenges

The existing form taken by traditional media is a legacy resulting from years of formation in a geographic, cultural, technological, political, and economic context. Today it is being remodelled by the influence of globalization and the Internet.

The upheavals that affect the media industry are technological, social, and structural. Technological developments are largely the boosters of the ongoing changes in the industry. They led to the advent of digital audio-visual production, the multiplication of distribution platforms, and industry restructuring with the emergence of new players and new strategies for existing businesses.

It is certainly easier to produce today, thanks to the digital tools that are available, but it does not improve the situation of creators and producers, for these new technologies also accompany or encourage the adoption of new consumption habits and new expectations that fit less well with the existing system.

Not just production, but also distribution and consumption are changing. For instance, we see:

- increased consumption of video over the Internet;

- the use of social networks, mobile applications, and websites operating in a complementary and interactive way to existing TV programmes;
- financing by micro payments that is increasing the influence of the consumer.

A recent study (February 2014) shows, in Quebec, “some substitution of audience from traditional television to niche/thematic channels and pay television, and a decline in movie attendance and number. More recently, there has also been a drop in DVD/Blue Ray sales and distributors’ revenue. There is also evidence that households spend more on access to content than for the contents itself while the frequency of the online and mobile consumption increases.”<sup>3</sup>

The effect of these phenomena on the production and value of audio-visual content, however, is not yet visible.

As a conclusion, we can affirm that there are still two converging constants: the public want content in order to be entertained or informed, and the authors have stories to tell, ideas to share, and the desire to achieve such content. Between these two points, the whole value chain may be affected.

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<sup>3</sup> <http://www.stat.gouv.qc.ca/statistiques/culture/cinema-audiovisuel/etat-lieu-cine-tele-cahier1.pdf>



## 4. Our vision

Since the end of the 20th century and the advent of the digital age, the media industry has been in turmoil. This sector, still largely influenced by the development of innovative technologies, is being reinvented every day: The emergence of social networks, development of human-machine interfaces, and gamification are some of the striking phenomena of the last decade. Also, the arrival of new players in this market, equipped with new monetization methods, has significantly impacted traditional media players, who must also rethink their business models, while carrying the weight of the past, unlike the newcomers.

Finally, these important changes are naturally prompting designers to rethink the content, to invent new narrative language, and to adapt to new consumption habits. The era of mono-media content is turning into a new era: Welcome to the era of transmedia!

How will Europe adapt to this phenomenon of transmedia? How will its talents, be they technical, business, or artistic, address this new creative era? These are key questions to put European cultural development in a globalized movement and to allow the European industry not to miss this strategic shift that positions the consumer at the centre of the process, no longer a spectator but a real player.

So, after raising the new challenges of transmedia in terms of audience, we shall discuss technological innovations that the industry is expected to face until 2030. We shall then conclude with the new business models of transmedia and content issues that the creators will have to address.

### Audience and final consumers

#### SUMMARY

Audience, through its engagement, will be at the heart of creation and influence in the future all the players involved in the transmedia economy.

First of all, the success of technology development will depend more and more on either its acceptance by the users/citizens or its “transparency” (users want a service that works and do not care about its embedded technologies).

Also, developing winning business strategies means taking into consideration the fact that public are increasingly heterogeneous and have increasingly demanding expectations. They are given access to a sophisticated content offer, through different media platforms, and are in the meantime consumers but also producers of content thanks to crowdfunding channels or creator of content thanks to content enrichment (UGC).

Finally, new artistic challenges are emerging as the creativity of traditional content producers working in their usual media channels is disrupted by the emergence of digital technologies. The strengths and specificities of local talents need to be reoriented to fulfil transmedia requests. Their ability to “think transmedia” will be key in order to keep their audiences instead of losing them to the global media leaders.

The present section will stress audience engagement and try to answer two main questions, namely, how to grab and maintain the attention of the audience and how this audience will influence the creative process in the future.

#### USER ENGAGEMENT

Initial concerns regarding transmedia works were mainly about technical issues. But one of the most important transmedia success factors may be user engagement. The creator-content-audience relationship should be centred on users.

**User-centred content:** Several reports and studies clearly recognise the importance of users in the development of transmedia for their potential to collaborate on the production of content and for the ability to generate value from their increased attention. Many academic studies also confirm this. For example, as Sonia Livingstone observes,

viewing “is converging with reading, shopping, voting, playing, researching, writing, chatting. Media are now used anyhow, anyplace, anytime”<sup>4</sup>.

“Contemporary audiences are organised as complex layers, networks, and segments (Webster 2005; Webster and Ksiazek 2011). Consequently, in their approach to media product innovation and distribution, content producers can no longer rely on well-established knowledge about aesthetic conventions or audience behaviours”<sup>5</sup>.

Stephen Dinehart, a renowned interactive narrative designer, understood transmedia recipients as viewers/users/players (VUPs) who each interpreted the narrative uniquely because of their respective natural cognitive and psychological abilities.

### Empowerment of the transmedia user

Empowerment is a sensitive multi-dimensional social process that helps people gain control over their own lives. It is a process that fosters power

for people to use in their own lives, in their communities, and in their societies by acting on issues that they define as important. Transmedia works are bolstering the user’s empowerment through interactivity, collaboration, and participation.

- Transmedia is a great marketing opportunity to generate business value in cultural and creative activities because its interactive and social aspects strengthen the attention of users and foster the contagion effects of the demand.
- Transmedia allows content producers to capitalise on the increase in user participation when users take part in the content generation process.

### The three user-related challenges

- In the sphere of cultural expression, transmedia should offer new communication formats through multiple new communication channels in an attractive way.
- In the sphere of advertising and marketing, empowerment should help increase transmedia users’ attention spans and loyalty and build on their social media involvement to enlarge and retain audiences.

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- 4 Livingstone, S. (2004) The challenge of changing audiences: or, what is the researcher to do in the age of internet? [http://eprints.lse.ac.uk/412/1/Challenge\\_of\\_changing\\_audiences\\_spoken\\_version.pdf](http://eprints.lse.ac.uk/412/1/Challenge_of_changing_audiences_spoken_version.pdf)
- 5 C.H. Davis (2013) “Audience Value and Transmedia Products” pp. 175-190 in T. Storsul and A. Krumsvik (eds.), *Media Innovations* (Göteborg, Nordicom).



- In the sphere of users, transmedia should increase users' involvement in the creation and production process, whatever their age, cognitive capabilities, and level of access to technologies.

We have to recognise that not all consumers are interested in interacting or even in digging deep in the transmedia narratives. Participating in transmedia storytelling requires an investment of resources, and at least time, to reconstruct a mental image of the story world and to immerse oneself in the story universe.

Elizabeth Evans argues in her book *Audiences, New Media, and Daily Life* that audiences do not uniformly welcome these new modes of media consumption: They have to consider the possible benefits for their individual preferences, such as interacting socially with others or solving puzzles. Measuring user engagement and loyalty as well as social involvement, interaction preferences, and willingness to participate in content creation is thus a first important tool for transmedia developers.

### From user to consumer

In his book *Convergence Culture: Where Old and New Media Collide*, Henry Jenkins recommended using two kinds of element in a story to engage the audience, namely:

- attractors to draw an audience together and
- activators to give the audience something to do.

Multiple components of transmedia narrative strategies have been proposed to do these tasks. Carlos Scolari identifies the four following components:<sup>6</sup>

- interstitial micro-stories to fill gaps between periodic instalments of content such as television series episodes;
- parallel stories;
- peripheral stories that can turn into spin-offs;

6 Scolari, C. (2009) Transmedia Storytelling : Implicit Consumers, Narrative Worlds and Branding in Contemporary Media Production. <http://ijoc.org/index.php/ijoc/article/view/477/336>

- user-generated content platforms to allow viewers to enrich the fictional world, creating what is now called "fan fiction".

Jenkins also suggested seven general principles of good transmedia storytelling, namely, (a) spreadability and drillability, (b) immersion and extractability, (c) world building, (d) continuity and multiplicity, (e) seriality, (f) subjectivity, and (g) performance or interaction.

It is interesting to examine spreadability and drillability in connection with reaching the audience and having the audience react to content:

**Spreadability** refers to the capacity of the public to engage actively in the circulation of media content through social networks and thus to expand its economic value and cultural worth.

**Drillability:** Jason Mittell has proposed a countervailing principle, what he calls "drillability", which may in some way be construed as "additive comprehension". Mittell's discussion of drillability is worth quoting at length here:

"Perhaps we need a different metaphor to describe viewer engagement with narrative complexity. We might think of such programs as drillable rather than spreadable. They encourage a mode of forensic fandom that encourages viewers to dig deeper, probing beneath the surface to understand the complexity of a story and its telling. Such programs create magnets for engagement, drawing viewers into the story worlds and urging them to drill down to discover more...The opposition between spreadable and drillable shouldn't be thought of as a hierarchy, but rather as opposing vectors of cultural engagement. Spreadable media encourage horizontal ripples, accumulating eyeballs without necessarily encouraging more long-term engagement. Drillable media typically engage far fewer people, but occupy more of their time and energies in a vertical descent into a text's complexities."<sup>7</sup>

Helping to spread the message may well be central to enhancing viewer engagement and may encourage further participation. Both potentials

7 Mittell, J. (n.d.) Forensic Fandom and the DrillableText <http://spreadablemedia.org/essays/mittell/>

may be built into the same transmedia franchise, yet they represent, as Mittell suggests, different dimensions of the experience, and there may well be cases where a franchise sustains spreadability without offering any real depth to drill into or offers depth and complexity without offering strong incentives to pass it along through our social networks. More work needs to be done to understand fully the interplay between these two impulses that are shaping current entertainment experiences.

### **Accepting and promoting new roles to the audience**

First we have to be clear that there is a myriad of different interests in an audience and each one will allow and foster different interactions. On the other hand, the media industry has been trying to remap content distribution channels. Producers and distributors with new ideas about how to reach their audiences are entering the marketplace. There has also been an accompanying effort to rethink the interfaces with media audiences.

Many media channels are opting for various strategies to ensure consumer loyalty and to create social buzz to promote their individual programmes or networks above the multiplying array of media options. This reinvention of how content is accessed and processed by audience is still in its infancy.

We cannot ignore the fact that some new content creation and consumption schemes will escape the hands of traditional media companies. The current media distribution platforms based on Facebook, YouTube, and others became enabling channels for talented creators with a loyal base of followers. That new audience is reinventing media financing, creation, and distribution.

Early network bottlenecks are no longer a limitation. Creators release content directly to fans, who follow the creators and share the content with friends. Musicians and web content creators can produce stories of whatever length, style, and genre they choose, according to their own schedules, and with actors of their choosing. The result is a truly open creative ecosystem in which creators, talent, and fans work together on the stories that they want to create and see.

In any case, the spectrum of content creators and prosumers is very broad. So, it is necessary for producers to develop a deeper understanding of fandom's own diversity, hierarchy, and aims. There is a clear danger that production companies will pay more attention to some fan groups than others that are also interested in this content.

**Battle for user attention:** in our world of cultural markets of over-abundant information the demand for attention tends to be infinite. However, and since the amount of attention available per capita is limited, attention is becoming a scarce resource.

The introduction of “new” information and communication technologies and the consequent development of many new media have exacerbated competition among the various content and distribution channels that are fighting for audience attention.

Marketing and Web development use a traditional user-centred business model, while film and, to some degree, TV production are more production driven, so that marketing comes second to the creative process and is less prominent from the beginning.

For most professionals the benefits of transmedia are clear: more immersive, reaching more target groups, stimulating user communities, and achieving better interactivity with the audience in general. These advantages are pushing professional creators gradually to embrace the transmedia approach. However, the increasing complexity of media environments, media formats, media consumption patterns, and device capabilities is making audience engagement harder to predict.

### **Current mechanism of user engagement**

The distribution of attention between cultural offers is very uneven, since a few products tend to get most of the attention. Consequently:

- Successful products can give some visibility gifts to less prominent cross-subsidised productions. Content distributors have to manage to redirect part of the audience's attention from a “blockbuster” to a few selected cross-linked offers,





both in the content itself, or as a suggestion to the audience, based on the user's interests.

- Content's "long tail" captures very little attention, and some part of it can generate significant business only if it covers a wide range of products.

Interactive transmedia content may capitalise on video game strategies to maintain attention and engagement. For example, the user response level could be used as a parameter to adjust the content to the user's skills and in general to keep the user's interest on the best possible level.

"Transmedia helps us to bring coherence to our services. It also gives the opportunity to adapt the story for every kind of user and/or audience." M. Abramovicz, Fact Productions, Transmedia pure player, SME.

To attract the audience's attention, transmedia projects may be supported by the traditional support systems used by the film and TV industry, that is, at least in some countries that are partly

open to cross-media or transmedia productions. However, storytellers are reluctant to venture into the forefront of technological development due to the risk of losing their audiences along the way, as most users are not early adopters of technology. That is why they target often carefully selected niche audiences with nationally or regionally supported new media productions. The opportunity to collect precise data on preferences and audience behaviour also helps to convince both brands and content producers to use new ways to reach and engage audiences.

### **The network effect**

"The creative industries represent the domains of economic activity in which social networks are the predominant factor in determining value."<sup>8</sup>

From this perspective, the forms of organisation and interaction of creative and cultural activities

<sup>8</sup> Potts, Cunningham, Stuart, Hartley & Ormerod (2007) Social network markets: a new definition of the creative industries <http://link.springer.com/article/10.1007%2Fs10824-008-9066-y#page-1>

on the Internet are strongly conditioned by the existence of network effects, also called externalities of network or economies of scale of the demand:

The network effect is the effect that one user of a good or service has on the value of this product over others. So, when network effects are present, the value of a product or service depends on the number of people who use it, which leads to the compatibility or standardization of systems.

The existence of the network effect gives rise to three fundamental issues:

- The integration of cultural and creative activities in a broader system of products.
- The existence of social contagion dynamics in which the winner gets everything (winner takes all).
- The emergence of new dynamics in cultural intermediation on the Internet that are organised into bilateral (two-sided) markets.

**Social contagion (winner takes all):** the value of a cultural product or service depends to a great extent on the number of people who use it. This is a network effect that generates economies of scale on the demand side.

This mechanism introduces positive feedback in the market that reinforces those who succeed – it “sets the fashion” -- and worsens the situation of those who don’t and remain unknown. Therefore, cultural markets are winner-take-all markets.

“The dynamics of social contagion requires innovative strategies and business models, which take into account the importance of networks”<sup>9</sup>.

Social contagion suggests that you should:

- be the first to establish a consumer base in a particular format, genre, or fashion, as this can be very advantageous.
- attract providers such as artists, authors, and members of the star system to improve your competitive position.

- raise expectations with promotional campaigns and influence all intermediaries such as media agencies and online distribution agents.
- keep your customer base up-to-date by offering successive productions of cultural works of known authors or artists.
- establish mutual confidence among producers, suppliers, intermediaries, and customers.
- help manage social contagion by investing in institutions such as clubs, user groups, and public associations that promote social interaction and cohesion in culture.

**Collaboration between individuals and organisations:** the user empowerment that comes with digital technology has opened the door to new forms of collaboration and participation through networks and social media. The last ten years have seen the emergence of multiple variants of mass collaboration initiatives, such as:

**Crowd Creation:** a collective creation process in more or less wide groups.

**Crowd Funding:** a process to obtain resources or patronage from a large user base. Many crowd-funding platforms have been created all over the world, with a strong showing of cultural projects.

**Crowd Wisdom:** a process that collects opinions and gathers knowledge from a group instead of the opinion of a single expert to solve a certain issue.

**Crowd Voting:** an evaluation process or collective score of certain issues.

**Collaborative Consumption:** a process that combines new ways to exchange, share, and lease objects and services powered by social networks and other platforms.

These new forms of collaboration should become more and more commonplace in the future and of course should evolve to become, notably, strong and efficient tools of creation or financing.

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<sup>9</sup> Kretschmer, Klimis, & Choi (1999) Increasing Returns and Social Contagion in Cultural Industries - <http://onlinelibrary.wiley.com/doi/10.1111/1467-8551.10.s1.6/abstract>



## Technologies

### SUMMARY

Transmedia is at the tip of the multimedia pyramid, where the latest developments in storytelling meet the latest digital technologies. That is why transmedia content developers face many uncertainties and unexpected roadblocks in the various phases of product development.

The interactive and immersive side of transmedia storytelling, entailing a far larger need for software development (in domains such as virtual reality, augmented reality, motion capture, gesture recognition, etc.) than the traditional linear media such as cinema and broadcasting, comes to mind first.

But also, while an easier access to content, thanks to the spread of storage and cloud solutions, will offer new opportunities to culture and its enrichment from diverse communities, technologies such as geolocation technologies and the Internet of Things will increase the audience's needs and, hence, demand for content.

### TECHNICAL CHALLENGES AND VISION

At least five categories of technical challenge need solutions in the coming years if we want transmedia to become more mainstream:

#### Data Formats' Interoperability

Transmedia means that audio-visual content and user interaction are available on a broad spectrum of different platforms, so either a story has to be unrolled in front of users through the common denominator of those platforms or costly specific variants have to be developed for each platform.

We need to overcome the "one device = one format" trend that hampers the spread of transmedia works. Any smartphone should offer its user a similar experience in terms of display, interactivity, and connectivity; any home user should be able to watch and interact with the story on a connected TV, laptop computer, or tablet.

We had great expectations for MPEG21 a few years ago but it failed to gain momentum; nowadays,



HTML5 is the most promising multi-device interoperable standard of the day, as it represents a set of features that people will be able to rely on for years to come. HTML5 is now supported on a wide variety of devices, lowering the cost of creating rich applications to reach users everywhere.

According to Tim Berners-Lee, W3C Director, "Today we think nothing of watching video and audio natively in the browser, and nothing of running a browser on a phone. We expect to be able to share photos, shop, read the news, and look up information anywhere, on any device. Though they remain invisible to most users, HTML5 and the Open Web Platform are driving these growing user expectations."<sup>10</sup>

We lack fully adopted interoperable standards for audio, video capture and rendering, sound, gesture interaction, location tracking, etc.

Examples of problems with existing non-interoperable devices:

- 3D animation on screen may use Flash technology in a PC but not on iOS devices such as iPhones and iPads;
- Interaction with a keyboard and mouse is far faster than virtual keyboards on connected TV sets and touch-screen tablets;
- There is no standard way to control a TV display from a user's smartphone or tablet, even when more and more broadcasters are expecting users to interact with both devices at the same time.

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<sup>10</sup> <http://www.w3.org/2014/10/html5-rec.html.en>

## Open-ended Platforms

Static and interactive content should be consumed on constantly upgraded hardware and software, but content developed one day may not be presented to the user in the same way two months later because the upgrades of the devices, operating systems and peripherals that have been effected in the interim disrupt the experience. Norms, standards, and good practice rules on how and for how long the features used in the production of a transmedia work should remain stable are required for transmedia content producers and software designers. As a consequence, transmedia content is difficult to keep and re-use later because little --if any -- backward compatibility is built into our constantly updated electronic devices.

Example: Screen resolution and animation quality may be assumed to remain unchanged during a smartphone operating system upgrade, but the CPU power or memory size available for an interactive experience may be affected, so latency and animation smoothness may suffer. During such upgrades, some services, such as voice recognition or image feature extraction, may be moved from the local application (i.e., inside a smartphone) to a remote one (i.e., a cloud server). Not only will this drastically change speed and latency, but it can sometimes modify the interactive experience in very hard-to-predict ways.

## Resource Adaptability

Transmedia is almost impossible to experience without using global resources, e.g., cloud storage and processing, local graphics and sound processing within the user's device, data transmission through wired or wireless internet channels, etc. Resource availability may vary widely from one user to the next and from one hour to the next. Wi-Fi and ADSL connections do not have infinite bandwidth and are shared among groups of local users. The same is true of the cloud, where the servers managing a complex transmedia experience may suffer from very sharp peak demands. Communication networks are also more often reaching their limits in specific locations, such as densely packed urban centres, or at specific moments. We thus need more resource variability mitigation solutions: clustering and buffering of cloud services, dynamic transfer of part of the processing between server and client, and other infrastructure developments.

## User Tracking Concerns

Transmedia is typically consumed on more than one type of hardware, simultaneously or sequentially, and by individuals or by groups. To follow a story and to progress in its understanding, the user has to be monitored by (part of) the storytelling components. For example, a server will



store bookmarks, rewards, bonus points, discoveries, etc., for each user and group. The display status (the transmedia equivalent of timecode in a movie) has to be stored when the user leaves the story universe and restored when he returns. What is more, that may be on the same or on another device.

Solutions to this problem exist, but the more information you store about one or more users, the more privacy and piracy risks surface. Transmedia has a need for standardized, secure, and confident methods to store, transmit, access, manage, and update user data.

### **Pervasive Interfaces**

Watching a movie on the TV was almost easy; the only technical issue was to deal with black bands on the top and bottom of the screen when watching wide aspect-ratio movies on an old 4:3 set or (the awful prospect of) stretching 4:3 movies on new 16:9 screens. Now the situation is more complicated: Transmedia is coming onto the scene in an age of video projectors, big LED TVs, second screens, tablets, and smartphones of various sizes and aspect ratios, from narrow portrait to almost square tablets, and so on.

Sound rendering suffers from the same variability at the client side, ranging from tiny monaural phone speakers to stereo earpieces to the big 7.1 surround sound of high-end home cinema setups. Providing source audio-visual content in 4K high frame rate 3D with Auro-3D sound to everybody clearly is not the solution, as Wi-Fi bandwidth, smartphone processors, and ADSL networks will be unable to manage the huge amounts of data required. Graceful degradation of content is already commonplace, but lags, delays, quality inconsistencies, and other flaws are extremely common. Transmedia requires more efficient solutions not only for audio-visual stream optimisation but also for interaction data. Audio-visual quality is not the only concern, as lag time and transmission delays are very important when interaction comes into play.

## **THE FUTURE OF TRANSMEDIA TECHNOLOGY**

With enough well-focused R&D efforts, the demand for transmedia content from both audiences and producers will be met without any technical hassle with standardized, always connected, cloud-assisted software running on a wide range of yet-to-be-invented wearable, mobile, and interactive & immersive devices.

## **Business**

### **SUMMARY**

The paradigm behind every business model is simple: “I’ve got something that someone else wants and is prepared to pay a price for”. But then things immediately become more complex.

To get an understanding of future business models in the transmedia sector, one can look at a few current industries and models, mainly the global games industry, streaming services such as Netflix, and the whole e-commerce sector dominated by Amazon.

Also, it is necessary to understand that future business models will be inspired by two main business categories:

- Productions centred on content and IP rights monetization.
- Promotion, marketing, and other awareness-raising campaigns for brands or events.

The first one is mainly in the hands of the traditional media, which are struggling to evolve, with their old business models to be adapted, in a more and more competitive global environment. The second one is the result of the coming on the market of new entrants, with new business models, that can evolve in the global environment with more flexibility.

How should all these players evolve in the coming years to keep winning over their audiences?

“New Economy” thinking from the early 1990s and Chris Anderson’s writing on “Free as a business

model”<sup>11</sup> and new forms of economies are worthwhile sources of inspiration at the time of drafting or defining visionary new transmedia projects and writing down their business models.

Also, this section takes a closer look at the models of financing

Finally, key elements that should affect the transmedia economy, such as intellectual property, audience engagement measurement and methodology, and user-generated content (UGC) are highlighted



Chris Anderson - Wikimedia Commons

## TRANSMEDIA BUSINESS MODELS

### Transmedia business and the New Economy

The rise of the digital distribution of content and services has been predicted since the mid-nineties in parallel with the shift from heavy industry to the information and service economy<sup>12</sup>. The term “New Economy” was used as a buzzword to describe emerging and fast-growing industries that were on the cutting edge of technology and had been

the drivers of economic growth since the beginning of the 21<sup>st</sup> century.

The new economy is commonly believed to have started in the late 1990s, as high-tech tools, such as the Internet, and increasingly powerful computers began penetrating the consumer and business marketplace. In the new economy, many new kinds of company were created and continue to grow, some rather exponentially. The list of emerging activities devised around 1997 remains valid today:

- Online retailers
- Crowdfunding
- Mass customisation
- 3D printing
- Social media
- Sharing economy
- Car and bicycle sharing systems
- Peer-to-peer renting and sales
- Online dating services
- Online advertising

This quick glance in the rear-view mirror reveals that most of the predictions have come true, despite the temporary road bump caused by the dot-com crash.

### Free as a business model

The obvious reason most products are not free is because their production costs are not zero – it costs money to make things and that cost must be met. Digital markets are an exception to the rule. For almost all digital products, the marginal cost of reproduction is zero. Therefore, sooner or later, it is almost inevitable that producers in the digital realm will find themselves competing against products that are free. If you accept this fact, the smart thing to do is to try and figure out how to use a zero price point profitably yourself and get there first.

So said Chris Anderson in its 2009 book *Free: The Future of Radical Price*. The ideas around Free have also trickled down to our 2014 real world as “Freemium” and “Free2Play”. So, it is almost certain that Free will stay as a stepping stone for new

<sup>11</sup> *Free: The Future of a Radical Price* by Chris Anderson is available for free on Amazon: <http://www.amazon.com/Free-Future-Radical-Chris-Anderson-ebook/dp/B004E10RV8>

<sup>12</sup> [http://en.wikipedia.org/wiki/New\\_economy](http://en.wikipedia.org/wiki/New_economy)

business models in all digital-related industries, including the transmedia sector.

### Data-Driven/Free2Play

The Swedish game *Candy Crush Saga* is currently the largest game in the world. Around 100 million people play the game every day (data for 2014).

The main business model for *Candy Crush* is to give away the game for free.

Now, one might wonder how a product or service that is free can generate enormous amounts of money. And to try to understand, analyse and systematize this is a large part of understanding the future business models, not only in transmedia, but in other large sectors of the digital economy as well.

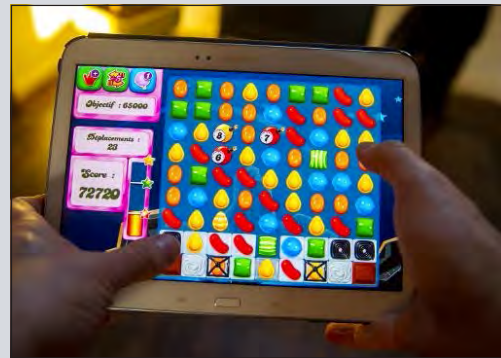
The secret of King's success is data mining and data analytics. One hundred of the approximately 500 people working at King work with data analytics: They are slicing and dicing the vast amounts of data generated by 110 million players every day to extract a concentrate of valuable, monetizable information. Analysing data not only gives the company the ability to fine-tune *Candy Crush* but it also gives input for new game concepts.

King's production model may be summarised as follow:

- Have a small team of 4-6 people work on a new IP/game concept for 4-6 months.
- Test it on 10 million people.
- Analyse the user feedback data very meticulously.
- Make decisions on whether or not to go on to full production.
- If it goes into full production a much larger team is assigned to the IP; the team is made not only of game developers but also of marketing, community management, and data analysis specialists.
- Once the game is good enough to publish, King can reach out to around 600 million people,

Within a year of its release for Facebook in 2012, *Candy Crush* had become the social networking site's most popular game. It was the most downloaded free app of 2013 and the optional paid-for extras generate €700,000 in daily sales.

As a result, *Candy Crush* is now responsible for nearly three-quarters of King's revenue and analysts estimate that the company's annual turnover is around £300m.



Source: The Guardian, May 11<sup>th</sup> 2014. <http://www.theguardian.com/technology/2014/may/11/candy-crush-saga-games>

cross promoting the new game within old games such as *Candy Crush Saga* or *Pet Rescue Saga*.

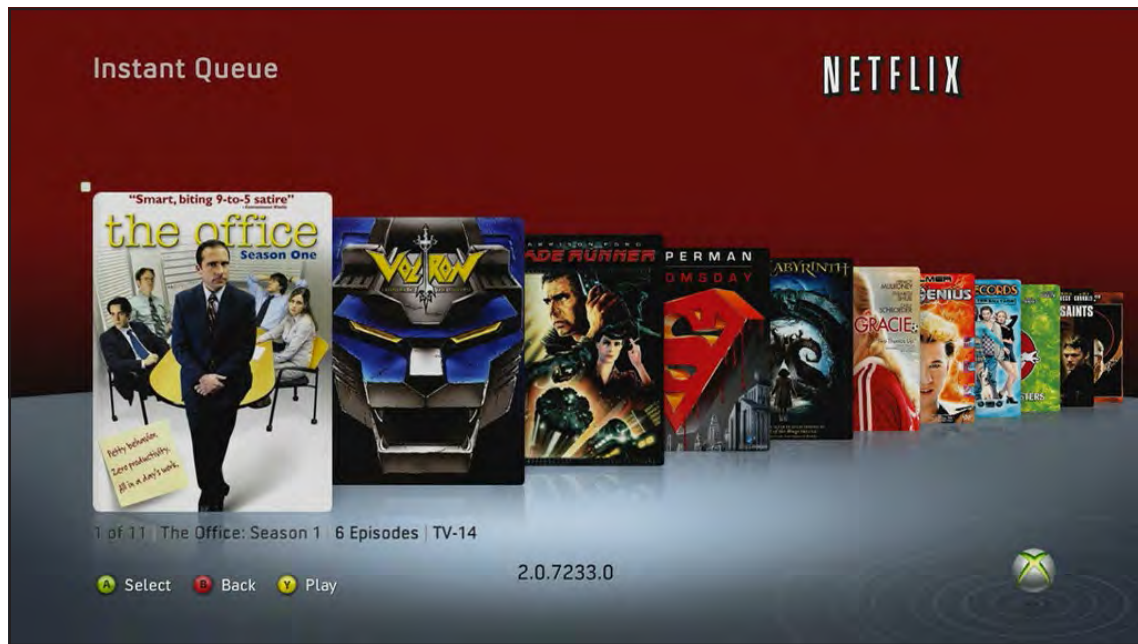
It is a data-driven game and entertainment factory. But King is also been one of the leaders among game makers spearheading the new “free2play” business model combined with in-app purchases.

This has been done in a clever way. The *Candy Crush* player may play only a limited session per day for free. If the player wants to play more he has to make an in-app purchase to be allowed more time or more sessions. That mechanism alone has earned King billions of dollars (and a world of more or less frustrated players).

### Streamed Media business models

Netflix started with an old business model, DVD-by-post, and did very well in that ecosystem. They had a flat rate for the service and a great selection, no extra fees for being late, etc. But Netflix has done what most technology companies have not: It went beyond its original capabilities and





developed skills in online streaming. Specifically, Netflix decided to compete with online content providers and to develop and distribute its own content. That original content strategy included a new season of “Arrested Development”, a U.S. remake of “House of Cards”, and a new series “Orange is the New Black”. Three of those original series earned Netflix fourteen Emmy Award nominations and three wins for “House of Cards” in 2014.

Netflix spent \$100 million on its two seasons of “House of Cards” and CNNMoney reports that Netflix expects to double its spending on original content in 2014. But so far, Netflix has made that investment pay off. Today Netflix has 30 million subscribers in the U.S. alone. Consequently, more than 35% of peak Internet use per day in the United States is Netflix streamed content.

The Netflix business model is based on flat-rate monthly subscriptions and a large offer of premium content mixed with cheap “cut-out” content. The only competing model is the streaming of pirated content.

## Internet Business

Amazon is the world’s largest Internet retailer. Coming from a traditional retail business model, it evolved steadily from its beginning twenty years ago and its complex business is unlike any other, but is viable only within an extremely large company (Amazon’s revenue exceeded US\$74 billion in 2013).

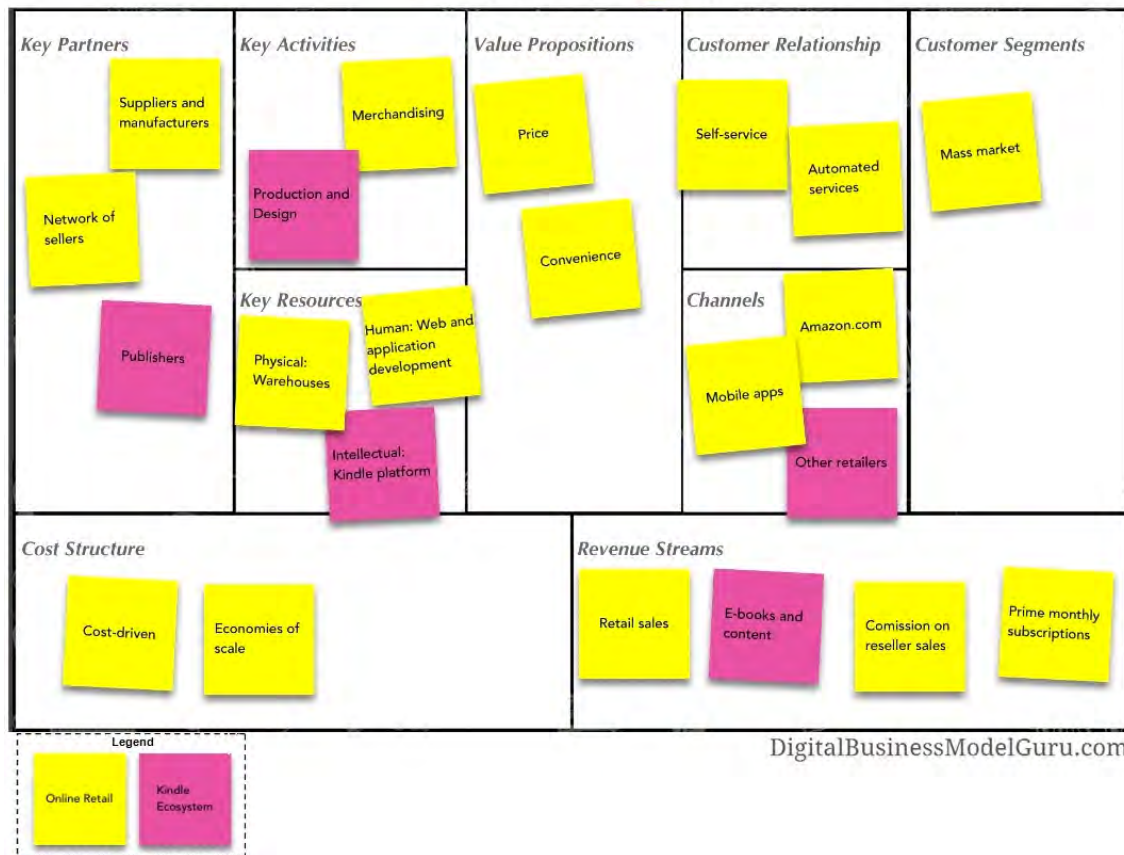
Amazon defines itself as doing the following:

- Online Retail
- Internet Services
- Digital Ecosystem

The company runs these lines of business in terms of product sales, service sales, Amazon Web Services (AWS), fulfilment, publishing, digital content subscriptions, advertising, and co-branded credit cards.

The Amazon value propositions of price and convenience hold true in all of its product categories, allowing it to extend itself into new markets and deepen its customer relationship. The company has dominated the online retail trade with a fairly standard traditional retail business model over the Internet, using its buying power and financial

# Business Model Canvas: amazon.com



resources to dominate the marketplace. This dominance will continue well into the future as Amazon continues to explore new product and service categories. What we should not necessarily expect from Amazon are simple or unique business models. The company has developed clear expertise in e-commerce innovation, which it has applied to a variety of traditional business models. The key lesson to be learnt from Amazon is that to thrive in the digital era, it is often better to execute your business model well than to invent new business models from scratch.

What Amazon also does is to be truly innovative in finding new areas, services, and types of goods that can be brought into the Amazon structure, turning parts of Amazon into a platform and a marketplace for third-party suppliers and goods and services provided by someone else.

## NEW DIGITAL CURRENCIES

Straying slightly from the scope of this report is the matter of which currencies will be accepted and valued in the future business models.

Besides traditional currencies, Bitcoins and various point/bonus-based schemes are being used for transactions more and more instead of valid currencies and payments. Bitcoins, the point-based systems that are in place in many online games, and the frequent flyer bonus points that are granted by aviation companies are just the beginning.



## Future business models

Future business models will be open, Web based, and data driven. They will integrate many different revenue and business models in more and more adaptive ways. Companies will move between business models and revenue streams in a flexible and agile way. Future business models will be based on fairly complex contracts, agreements, and conditions around terms of service. Future business models will have to comply with a set of rules dictated by a few giant companies constituting a de facto ecosystem in the digitally connected world. Those companies are known as “GAFA”, an acronym standing for Google, Apple, Facebook, and Amazon. The written and unwritten rules of the digital ecosystem can -- and most probably will -- be changed overnight and weigh heavily on the terms of service, publishing rights, distribution and monetization agreements used around the world.

Future business and revenue models will be based on the following components:

- Revenue Share: The most dominant example of revenue share today is the 70/30 split of income Apple’s App Store does with anyone publishing and distributing content over App Store.
- Subscription models: The good old traditional model is still applied in the digital age.
- Freemium: Some content is given for free, but you can get premium content if you are willing to pay for the extras.
- Crowdsourcing: Prefinancing content by pre-selling it directly to its customers
- Free2play
- Play and pay and content on demand
- Try and buy
- Data collection
- Pay per use or per print
- And most probably other models not yet invented.

## TRANSMEDIA FINANCING MODELS

### Traditional financing model

Investments in the transmedia sector follow primarily models from the film and media industries, both for monetized content and marketing campaigns.

Most of what we consider transmedia is part of the cultural and creative industry sector, so grants and governmental support structures are worth considering.



Grants and support can be categorised as follows:

- Grants: Part of culture policies, varying from country to country. Examples: The New Danish Screen and Nordic Game programmes.
- Support programmes: Film financing programmes from film institutes and the European Commission. Support programmes are often part of a culture policy and therefore slightly skewed from a business point of view.
- Projects: There are many different schemes for financing projects on the regional, national, and European level. Very few of those opportunities are “free” money.
- Project financing schemes are often part of more or less strict programmes or have more or less strict conditions attached to them. That means that in order to get that kind of financing, the business ideas are adapted in a sometimes not so productive way.
- Tax Breaks: Tax breaks are various schemes for easing the burden of research and development. Typically tax breaks on production or on salaries are tied to local production. The UK recently made a tax break programme available for the British games industry.
- Investments: Normal equity investments or soft investments in the form of deductible loans or warrants. Within the media sectors there are many examples of slate funding or portfolio investments, the two latter models being ways for investors to spread the risk by investing in several related cases at the same time.



- Completion bonding, offered by a completion guarantor company, is often used in independently financed films to guarantee that the producer will complete and deliver the film.

### Modern financing model: The Finnish way

Most of the financial models and support structures described above are part of traditional financing possibilities and should evolve in the future into more modern schemes.

A sign of such adaptations is given by the changes in the EU's Media Programme and the New Danish Screen programme. Completely new ways of organising support structures are seldom observed.

Indeed, the Finnish games industry has been very, very successful over the last four to five years. With cases like Angry Birds, Clash of Clans, Max Payne and the Ubisoft acquisition of Redlynx studio and, not least of all, the 1.5 billion dollar investment in Super Cell studio, the local games industry has grown fivefold.

Much of the credit for this goes to Tekes, the Finnish innovation agency that made a close-knit programme specially tailored to the games industry.

### SKENE – GAMES REFUELLED<sup>1</sup>

The game industry is the fastest growing branch of the entertainment industry and financially Finland's most significant field of cultural export. Tekes' Skene – Games Refuelled programme aims to strengthen Finland's position as a hotspot for gaming and entertainment industry.

Skene offers funding, business development sparring, matchmaking services for meeting foreign gaming companies, publishers and investors, networking, and market surveys.

The extent of the Skene funding is around EUR 70 million per year.

<sup>1</sup> <http://www.tekes.fi/en/programmes-and-services/tekes-programmes/skene/material/>

When envisioning the development of new support structures we recommend taking a very close look at what Tekes has accomplished before looking at traditional support for the film industry.

#### **A new financing model: Crowdfunding**

The user empowerment that comes with digital technology has opened the door to new forms of collaboration and participation. One of them is crowdfunding, a process to obtain resources or patronage from a large user base. Many crowdfunding platforms have been created all over the world, with a strong showing of cultural projects.

The lack of support for transmedia creators from traditional financing models has had the consequence of positioning crowdfunding platforms as key players in the transmedia economy. This phenomenon is also a huge political change in the financing of culture in Europe. Europe is turning from a full public financing model towards a private financing model, which, hopefully, could help Europe to become less dependent on the outside in terms of cultural consumption.

As the transmedia producers will increasingly have to rely on investment from the private sector, supporting the creation of innovative financing tools should be a key element for the development of the transmedia industry. Tools such as crowdfunding platforms will evolve in the future into even more powerful and influential tools. Today they already seem to be the basic building blocks of the new digital economy for the creation of transmedia content.

Several successful examples could be highlighted to illustrate the potential strength of this financing model. One of them is “Veronica Mars”, which raised US\$2 million in 12 hours on the crowdfunding platform Kickstarter. This great achievement convinced its producer, Warner Bros, that besides the money, there was enough interest or excitement in Veronica Mars as a concept or franchise to consider future exploitation.

Another example is the “Reading Rainbow” project, which raised more than US\$5 million over more than a hundred thousand contributors (\$1 million in the first 11 hours). Reading Rainbow is an American children’s television series that

encouraged children to read. It aired on PBS Kids between 1983 and 1986.

In May 2014 a Kickstarter campaign was launched to make the app available on the Web, Android, game consoles, smartphones, and other streaming devices along with creating a classroom version with the subscription fee waived for up to 13,000 disadvantaged classrooms.<sup>1</sup>

<sup>1</sup> [http://en.wikipedia.org/wiki/Reading\\_Rainbow](http://en.wikipedia.org/wiki/Reading_Rainbow)

### **KEY ELEMENTS OF THE TRANSMEDIA ECONOMY**

#### **Important players of the digital world: Connectivity providers**

In most countries today you can get content directly from your Internet service provider.

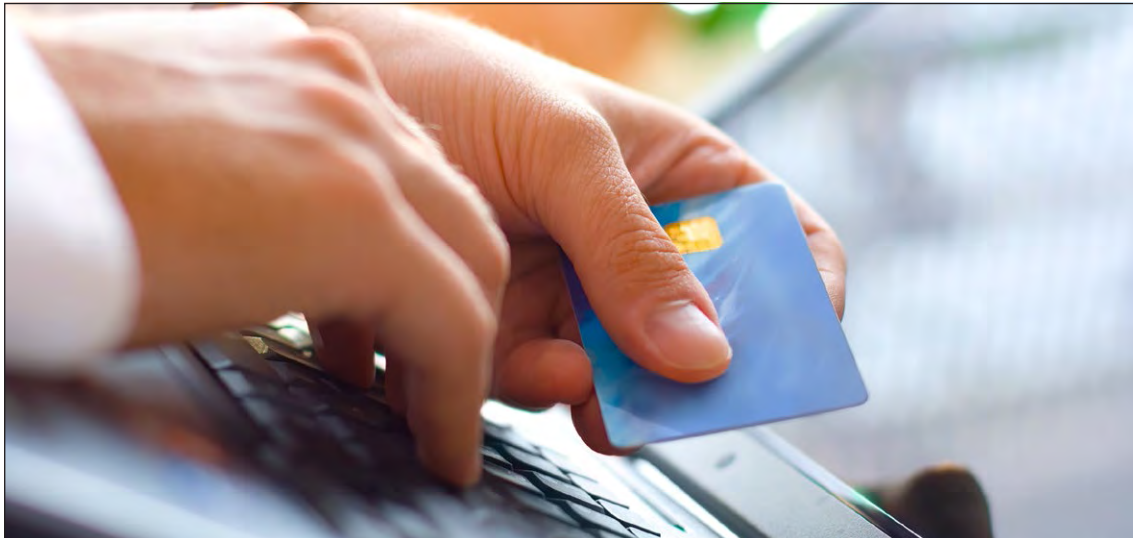
Partnerships between Telcos such as Deutsche Telekom, Vodafone, Orange, and Telenor and content providers Spotify, Netflix, HBO, etc., are among the most common channels to funnel content to consumers.

#### **Important players of the digital world: Platform/format holders**

The four largest technology multinationals, known as the GAFA (Google, Apple, Facebook, Amazon), and a few dozen other platform providers, such as Sony with its TV sets and PlayStation console and Microsoft with its Windows operating system and Xbox console, are unavoidable actors in the digitally connected world, since users need their products to access content.

Brands and intellectual property owners from both the real world and the digital world will continue to play an important role for business models. But instead of being simple producers, they are increasingly involved in more complex set ups.

Various publishers, aggregators, and large-scale e-commerce actors are also involved in transmedia productions.



#### **Payment system and transaction methods (PayPal, credit card institutions, etc.)**

Payment systems and solutions are and will be an important part of digital business models, but as the world of payments matures from where it is now, new markets with different mixes of business models will spring up.

Systems that allow crossovers from one content to another, from one type of media to another or that can cater to users moving across borders and countries are emerging. In what the Western world considers to be immature markets, such as Africa, the Middle East, and Latin America, credit card payments and digital payment systems are not in place yet. Instead you have various cash-to-digital currency conversion methods, such as scrape cards, top-up solutions, and point based systems that effect transactions between different contexts.

Deutsche Bank has also been interested in finding solutions for turning digital goods and services produced in online circumstances into a secure and regulated second-hand market for digital goods.

The creation of digital marketplaces is only in its infancy. We shall see many different payment solutions influencing business models in the future.

Speculating on what payment systems will be successful in the near future and which will compliment already existing ones is difficult, as usual, and would end up being pure speculation. But we can definitely say that we haven't seen the last of new payment models. That is especially true if you look at transactions between private persons.

#### **IP and Legislation**

The use of multiple platforms and multiple distribution channels makes transmedia IP rights management overly complex, especially in a globalized industry where IP managers, who are key people in the transmedia economy, must address local legislation.

What could be suggested is that IP rights ought to be harmonised at least across Europe. However, since transmedia content, productions, and services span a huge spectrum, from digital rights to merchandising and patents, it is hard to point to a specific route to take.

Overarching patent legislation is much needed on the EU level, no matter which industry is considered, not only to curb piracy and illegal activities tied to media content, but also to harmonise and simplify all media – and of course transmedia – business models.



## **Audience engagement measurement and methodology**

The new non-linear broadcasting of sounds and videos has brought new concepts to the media sector, especially the following:

- The capability of the user to watch the same programme many times. This action is really important in analysing the behaviour of the user and his/her interest in the content concerned. This is a new behaviour created by non-linear broadcasting.
- The possibility to interact with the channel using other devices such as smartphones, tablets or smart TV brings a new dimension to measure the interest of the user and how far he/she wants to go in the interaction. Interactions also means the possibility to “guide” the interactive user by orienting him/her in some sub-domains of the contents and to measure furthermore his/her interest or, more incredibly, to create this new interest.
- The record feature of the non-linear media channels is also a new behaviour to measure. Not only the recording action but also how many times the content is “re-used” by the user and how long the content is kept available can be measured.

The impact of these features are very important for the transmedia industry, for advertisers have to find new business models to make their adverts interactive, too, and then avoid allowing users to bypass them.

In that respect, “Engagement” is one of the most frequently used words in the transmedia industry. There are several ways to measure the engagement between a brand and a customer. But in the coming years, engagement will step forward. This industry will begin measuring every touch point between brands and people.

- Database registers
- Social actions: likes, comments, shares, retweets, favourites, etc., in Social Networks.
- Consumer perception changes: before and after living an experience.
- Improving Social CRM
- Research into improved brand perception
- Etc.

And we will see “Brand Engagement Ratings” in order to improve transmedia projects. That in turn will encourage customers to conduct other trans-media projects.

To reach that goal, audience measurement methodology is one of the most important parts of a holistic approach and needs to be addressed as a priority. Many methodologies, with their advantages and weaknesses, could be taken into consideration and the European market is probably too large to consider one single approach. The importance of comparing them and making choices is primordial in this matter.

## **User generated content (UGC)**

User-Generated Content (UGC) is one of the fields in which companies are currently making research efforts. Content providers are already using automatic filters on UGC in order to check its compliance with legal and quality issues. Such automated content analysis takes account of the content itself but also analyses source reliability and credibility in order to ensure that a given quality threshold is reached.

The art of UGC filtering is still in its infancy and more research in the field is clearly necessary in order to ensure the constant and robust use of UGC in transmedia works.

The value of UGC depends on its type, which is roughly broken down into three variants:

- user feedback and comments regarding the main published content (many occurrences, low value);
- supplementary content to be published along with the main content to increase public awareness, engagement, and loyalty (fewer occurrences but higher value); and
- completely new content to be included in the main content but that redefines (part of) the main storytelling (infrequent occurrences, possible high value).

It would take time for audiences to mature, and at the same time to be engaged, and then to pay for new experiences. Social media have made user engagement widespread and more diverse. Services such as iTunes, Spotify, and Netflix are



proving that new distribution channels can generate new revenue streams.

Many creative, technical, and financial ways of dealing with UGC have yet to be invented. That is why transmedia should learn from the modern aspects of user-driven innovation and design methods that are dominant in the start-up culture and design industry: putting the user in the centre and prototyping and testing ideas and products with selected users.

In that respect, we see today that strategies such as Influence Marketing will grow in the coming years because people admire other people (like YouTubers, bloggers, and influencers) more than brands. And influencers are the next starting point to reactivate consumption, especially between youngsters.

## THE FUTURE OF TRANSMEDIA BUSINESS

In the past, transmedia has been the “poor relation” in great projects: too many risks, too much

work... but very low budgets. In the coming years we are going to see:

- specific budgets for transmedia projects,
- transmedia producers inside audio-visual producers: specific team to lead multiplatform projects,
- a collaborative economy peak,
- collaboration agreements between producers and providers to obtain a percentage of the profits, and
- a redefinition of ROI that takes all these points into account.
- More and more projects will use transmedia storytelling to improve their impact: from the corporate communication industry (to achieve CSR (Corporate Social Responsibility)), through the media industry (to propose more and more mixed contents), to non-media industries, which are getting more and more digitized every day, in order to create new business opportunities.

## Artistic

### SUMMARY

“A culture cannot evolve without honest, powerful storytelling.”<sup>13</sup>

Transmedia storytelling is a prolongation of campfire storytelling: New technology and new tools change the way we consume stories, but not the elements of the stories themselves. There is no single definition of transmedia: there are discussions on the degree of user engagement and interactivity expected, on the definition of transmedia storytellers (background and skills), as well as on the architecture of transmedia content (story design vs world building).

What we know is that transmedia content creators will have to meet the expectations of consumers, who increasingly want ATAWAD (Any Time, AnyWhere, Any Device) content. The consumers through different tools will have a larger and larger influence on the creation of contents. The consumer is no longer a spectator but definitively a participant.

Also, storytelling is the basis of content, including transmedia. Given a complex universe, we must

ask ourselves, “How are we going to break the story down across several platforms, and do this so that the user experiences the content the best possible way?”

This section will answer the following two questions: What the expectations of consumers from now to 2030 should be and how to reach them in terms of content creation.

### EXPECTATIONS OF THE CONSUMERS

#### Interactivity

There might be an inherent conflict between traditional storytelling perspectives (which do not favour interactivity) and the wish and need to engage audiences in the long term.

Interactivity, engagement, and immersion are the top considerations for stakeholders. A new kind of audience – an Active Audience – needs custom content design to be engaged. As stated by Robert Pratten, “Technology and free markets have allowed unprecedented levels of customization, personalization and responsiveness such that a policy of ‘one size fits all’ is no longer expected or acceptable. Telling stories across multiple media – transmedia storytelling – allows content that’s right-sized, right-timed and right-placed to form

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<sup>13</sup> McKee, R. (1997) *Story*





a larger, more profitable, cohesive and rewarding experience.”<sup>14</sup> The biggest grossing businesses in the media industry are blockbuster films, usually not transmedia (Interstellar, etc.); sport broadcasting (football, Olympics); and videogames (Call of Duty and the like)

Interactivity will be a necessary option. Users will have options to interact with and to involve themselves in the story on different levels and will be able to have a rewarding experience, whatever the choices made.

### Digital Skin

The screen, whatever it is (laptop, tablet, mobile, etc.) is now the primary interface to access transmedia digital content.

By 2030, though, as technological transparency and universal access to networks are achieved, this will no longer be the case. New interfaces, new ways to access transmedia content and interact with the story universe will be increasingly available.

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<sup>14</sup> <http://www.tstoryteller.com/transmedia-storytelling>

### The Internet of things

As the “connected objects” trend goes mainstream, more and more objects are connected to the Internet. It is estimated that 30 billion devices will be connected wirelessly to the Internet by 2020 (ABI Research)<sup>15</sup>. They will not only have control, e-health, and smart cities applications, but they will also be potential parts of the transmedia experience.

### Technology miniaturisation & wearable computing

Constant progress is being made in technology’s miniaturisation. This allows the development of new interfaces used for both delivery platforms and content access points (e.g., connected eye-lenses).

Wearable sensors enable permanent monitoring of the user’s physiology. This can be used to enhance the user experience. (e.g., a horror video game that reacts to your fear stimuli).

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<sup>15</sup> <https://www.abiresearch.com/press/more-than-30-billion-devices-will-wirelessly-conne/>



### **New way to access the interface: voice, body**

We interact with content today mostly via sight, hearing, or touch. But new access points are being designed. As the screens dematerialize, our relationships with them do so, too. We will be able to interact with content via voice, gestures, etc. Intangible content will be accessible through physical media.

Traditional audio and video interfaces will continue to evolve with the emergence of virtual reality helmets from Oculus Rift and Magic Leap that will immerse our senses in full 360° environments.

This leads to the conclusion that the user himself is becoming the interface between different layers of reality, some tangible, some intangible. The lands of fiction will be present permanently and accessible at any time, adding another layer to our day to day life.

### **The experience continuum**

This will radically upset how we relate to reality. Users want to modify what's real, and have a certain power over the world they live in. The fading frontiers between the real and the virtual will allow them to have power over the world in which they live. Tangible and intangible reality will be layered, and equal parts of our lives. That new paradigm must be taken into account during the design and production process of transmedia content. Immersion and interactivity will be the key parameters.

Transmedia content will be immanent, and anyone will experience it their own way, on their own time. Content will have up times (for example, the release of the last episode of a TV series) and off times (any interaction with the content between the highlights).

Designing the experience continuum will be the challenge: How does one guarantee the consistency of the transmedia experience for different users, on different media, and in different time frames? How does one improve storytelling and adapt to these new paradigms?

## **CREATION OF A NEW WAY OF CREATING CONTENT**

### **Towards a Complete Transmedia Curriculum**

One of the major stakes will be to find and retain talents, in the context of stiff international competition. "Pure" transmedia profiles are still hard to find. However, by 2030, transmedia will be embedded in every educational curriculum and every segment of the industry, from design to distribution. It is a fast-paced environment and, thus, it is difficult to build a clear recruitment policy on a long-term basis. New jobs are appearing in the media industry. These "jobs", which are described below, are not archetypal; they are not job positions, but roles on specific projects.

We believe that transmedia isn't about jobs but about skills. Their terminologies are not frozen in time and are subject to constant debate. It also appears that few job descriptions actually use the terms listed below. A rapid search in international and widely known job sites is telling, since only a few specific transmedia opportunities come up in the search results. No studies have been conducted yet on the economic impacts of the sector, but we can estimate in the coming year that they will grow substantially. Furthermore, by 2030, such quantification will be meaningless, since transmedia skills will be required of every professional willing to engage in the industry.

By 2030, a complete transmedia curriculum will have to involve courses in storytelling, data and interoperability, technology, user experience, marketing, and project management to enable professionals to adapt to a fast-changing industry.

TRANSMEDIA DOMAIN	TOPICS
<b>Storytelling</b>	<p><b>Story architect:</b> how to design the architecture of the story</p> <p><b>Narrative designer:</b> the focus of which is to design the narrative elements</p> <p><b>Information designer:</b> the practice of presenting information in a way that fosters effective understanding of this information</p> <p><b>Specialist of theme-controlling ideas:</b> to analyse the way we respond to a work of art, including nonfiction work: “world building”.</p>
<b>Data &amp; interoperability</b>	<p><b>Spectrum Engineer</b> (data to information): Includes technology design, security, information (workflows) and communication design</p> <p><b>Interaction specialist:</b> In the field of software and devices, study of feedback systems (data analysis - smart data)</p>
<b>Technology</b>	Augmented reality, immersive technologies, coding/programming, interactive storytelling solutions, stereoscopic 3D, and game design
<b>Marketing</b>	Engaging a fan community; creating an experience continuum, brand content, product placement, licensing, communication strategy
<b>End User</b>	<p><b>End-user specialist:</b> Collaboration, knowledge transfer, and interdisciplinary cross-fertilization, and ergonomics/playability</p> <p><b>Cognitive and behavioural science specialist:</b> Intellect, Emotion, and Decision-making, and user management</p>
<b>Project management</b>	<p><b>Transmedia producer:</b> the person(s) responsible for a significant portion of a project's long-term planning, development, production, and/or maintenance of narrative coherence.</p> <p><b>Transmedia Project manager:</b> staff management.</p> <p><b>Transmedia director:</b> supervises the transmedia project</p> <p><b>Transmedia planner:</b> time, devices, information channel and feedback analysis</p> <p><b>Transmedia analyst:</b> the person who defines the right project at the right time and on the right platform, in connection with main results expected</p>
<b>Finance</b>	<b>Specialist in financial models:</b> business models to be considered in a project mode; specialist in financial packages taking account of content volume and value (content repurposing or original creations) and financial returns, at the international level.

### The future of transmedia storytelling

Henry Jenkins wrote with regard to the future of transmedia that different transmedia models would spawn different types of storytelling:

- U.S. West Coast: big budget transmedia franchise
- U.S. East Coast: collaborative, “indie” experiences to engage users
- Europe: publicly funded, educational transmedia (documentaries)
- Brazil: hybrid model

Transmedia storytelling as a living language will be spoken differently in the world. Therefore, every region will propose, according to its own economic, cultural, and social characteristics, transmedia coloured by the environment in which it operates.

However, some common features to the different transmedia languages should be observed as the interest for immersive and interactive content. The stakeholders’ main motivations for creating such experiences are numerous: improving the business efficiency, improving storytelling and user experience, stimulating community-based storytelling, or finding new ways to reach and engage a more diverse audience with targeted content.

Last but not least, transmedia will be a fabulous tool in other contexts than the media industry. Indeed, as a prospective societal trend, transmedia will influence collective intelligence and open innovation, in the sense underlined by S. Gallagher and J. West in the “Challenges of open innovation”, and to be understood as the systematic encouragement and exploration of a wide range of internal and external sources for innovative opportunities, the integration of this exploration with firm capabilities and resources, and the exploitation of these opportunities through multiple channels.





## 5. Conclusions

To complete a transmedia project successfully and make it more than an interesting concept (finally an effective industry), there should be a strong production capacity with high power investors, industrial tools to communicate it to markets and well equipped individuals and households to make this happen.

Transmedia content will require a design overcoming the challenges described above. Its authors should continue to innovate and improve the storytelling grammar to adapt it continuously to society's never-ending industrial, cultural, and economic evolution.

Technologically speaking, broadband access, cloud resources, and pricing policies are still inadequate in Europe for transmedia-facilitated flows on a large continental scale.

Also, the models for financing transmedia projects are unstable, per market and per initiative. PPP (Private & Public Partnership) financing models should remain an alternative to new financing models, involving increasingly the private sector and the final consumers through new financing tools to be developed but based on the crowd-funding models, notably,

Finally, it is unclear whether Europe will be reluctant, socio-culturally, to embrace transmedia mechanics, principles, and writing: Some cases, such as the way people behave with their cross-media devices, making content liquid and alive, prove that audiences are open to this rising concept.

But what will happen are specific variations per market due to local mentalities, giving ad-hoc colours to developments, such as what is observed in countries outside the EU (Japan, the U.S., South Korea, and Israel, for example), that show clearly distinctive type of transmedia applications and stories as well as various types of access diversification.

As a final conclusion, we see strong successes and a positive trend in the way some markets outside Europe are turning transmedia activities into a strategic business designed to be profitable. Transmedia has become an industry as such in Japan, South Korea, and the U.S., based on typical frameworks, albeit expressed differently according to the region.







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