

방송시장 변동과

혁신 저널리즘

강정수

non-linear consumption

**“Whatever will change
television will do so
by re-defining the core product
not just the tools we use to
consume it.”**

by Horace Dediu, Asymco

re-defining the core product

not just the tools

*What's going to kill movies and TV is what's already killing them: **better ways to entertain people.***

– Paul Graham, Y-Combinator



better ways to entertain people

Kevin Spacey

“Clearly the success of the Netflix model - releasing the entire season of House of Cards at once - has proved one thing: the audience wants control. They want freedom. If they want to binge - as they’ve been doing on House of Cards - then we should them binge.”

http://www.youtube.com/watch?v=P0ukYf_xvgc

**The audience wants control.
They want freedom.**

**If they want to binge, then we
should them binge.**

Kevin Spacey

“demonstrated that we have learned the lesson that the music industry didn’t learn - give people what they want, when they want it, in the form they want it in, at a reasonable price, and they’ll more likely pay for it rather than steal it.”

**Give people what they want,
when they want it,
in the form they want it in,
at a reasonable price**

Lean Forward

Lean Back

Linear Consumption

Non-Linear Consumption

Binge Viewing

Lean Back

Non-Linear Consumption

original video programming

original video programming

**TV (video) programming typically
unavailable through conventional
channels**

**TV (video) programming produced
by the network operator (or an
affiliation)**

Google's Big Video Push Is Here: YouTube Getting More Than 100 New Channels

Youtube Announces New Partners - Taking on Broadcast TV?
Adds 100 YouTube Channels of Original Professional Content

Matt Rosoff | Oct. 28, 2011, 9:0



Social Sharing...



Posted by Richard Kastelein in Writers on October 29, 2011 | 0 Comments

More from this author | Follow Richard Kastelein on: [Facebook](#) | [LinkedIn](#) | [Twitter](#) | [YouTube](#)

2011년



Rumours have been rampant since the [WSJ](#) reported in April 2011, that Google is overhauling YouTube to push more aggressively onto TV screens, competing head-to-head with broadcast and cable television for ad dollars. And they were willing to spend 100 million to do it. These channels will start coming online next month, as well as right on the big screen in the living room via Smart TVs, newer Blu-ray players, game consoles, many hybrid

With Original Channels, YouTube is Building a Parallel Universe to Cable

Tuesday, January 31, 2012, 10:22 AM ET | Posted by [Will Richmond](#)

There are many exciting things happening in the online video industry, but to my mind, none is more noteworthy than the radical transformation of YouTube. YouTube is shedding its scruffy adolescence and seeking to redefine what entertainment means in the online video era. In fact, with each passing day, it becomes more evident that YouTube is building a parallel universe to the traditional world of cable TV, targeting niches that have long been mined by a multitude of specialty channels. This [theme](#) will crystallize as 2012 unfolds.



YouTube's [100 new channels](#) of original online-only content have begun rolling out and will continue to

2012년



Home Gadgets Apps & Web News Reviews & Features Companies



WEB VIDEO

YouTube to Live-Stream the London 2012 Olympics for NBC

By KEITH WAGSTAFF | @kwagstaff | March 7, 2012 | 6



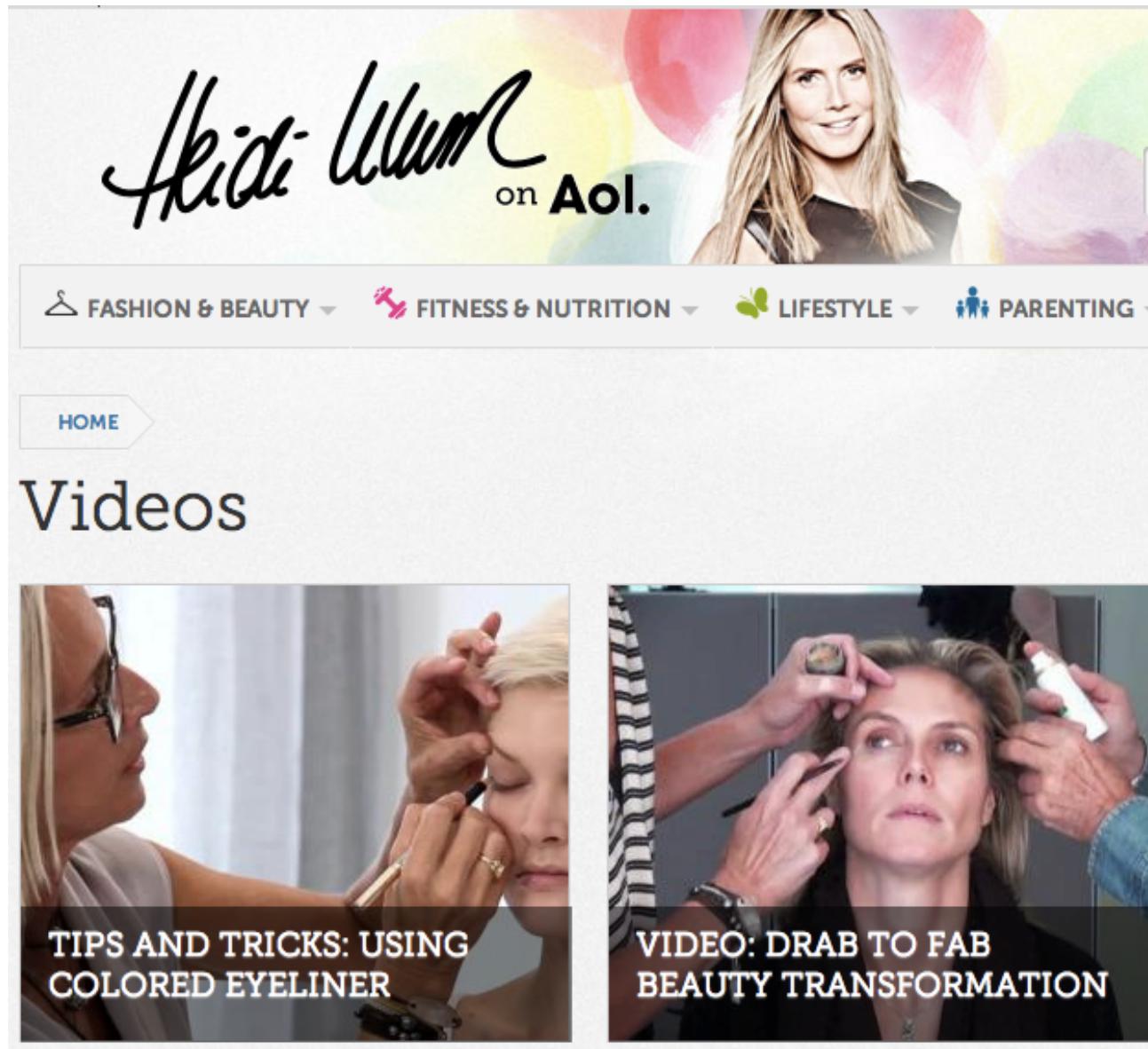
[Log In with Facebook](#)

Sharing TIME stories with friends is easier than ever. Add this story to your Timeline.



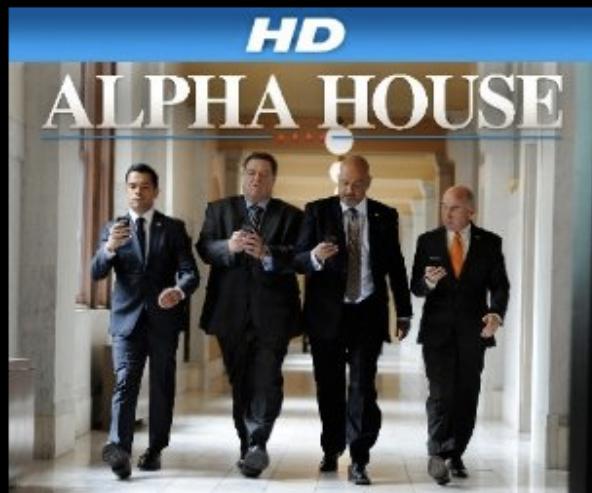
2012년

US TV company NBC has [partnered with Google-owned video service YouTube](#) to provide its video player and livestreaming infrastructure for the London 2012 Olympic Games. **Update: NBC has provided comment on its partnership, see below for more.**



2013년

<http://heidiklum.aol.com/category/videos/>



Alpha House Season 1, Ep. 1 "Pilot" CC

★★★★☆ (3,150 customer reviews) | IMDb 6.9/10

Also available in Standard Definition

Re-election battles, looming indictments, parties, their Party ... these senators need a drink. And a new housemate. An Amazon Original pilot, more episodes available soon exclusively to Amazon Prime Members.

Starring: John Goodman, Mark Consuelos

Directed by: Adam Bernstein

Runtime: 25 minutes

Original air date: April 19, 2013

Network: Amazon Studios

Watch the shows.

Call the shots.

Amazon Original Pilots

Great Entertainment Thanks to You

Learn more about Amazon Originals, coming soon exclusively to Amazon Prime Members.

2013년

http://www.amazon.com/Pilot-HD/dp/B00CDBTQCW/ref=sr_1_2?s=instant-video&ie=UTF8&qid=1370622412&sr=1-2

Netflix has already recouped its \$100 million House of Cards investment

By [Brad Reed](#) on Apr 23, 2013 at 9:15 PM



2013년

Facebook Is Getting Serious About Original Programming With "Facebook Live"



JOSH CONSTINE

Friday, May 10th, 2013

10 Comments



"House Of Cards" proved that great, exclusive content can create loyal customers. While Facebook isn't about to produce TV shows, it tells me that it plans to ramp up production of its **Facebook Live** original programming starting with a **talk with Star Trek celebrities** today at 5:15 p.m. PST. Comedian Andy Samberg will interview film director JJ Abrams and classic cast member and social media maven George Takei.

Randi Zuckerberg, CEO Mark Zuckerberg's sister, started Facebook Live in 2010. A website and Facebook app powered by Livestream, Facebook Live streams talks and offers an archive of past video clips. Users can discuss the videos in real time with other users and ask questions. Facebook Live moderators then pick

2013년

Microsoft launches The Music Room, an interactive TV series on Xbox Live

By Melissa Grey posted May 20th, 2013 at 12:44 PM



A day ahead of its hotly anticipated [Xbox event](#), Microsoft has announced a new interactive TV series entitled *The Music Room*, exclusively on Xbox Live. As a part of Microsoft's drive to [beef up Xbox's entertainment content](#), the two-part program will

Peerby's Local Lending App Ready To Help Neighbors Participate In The Sharing Economy



FEATURED STORIES

SEPTEMBER 27, 2013

[iMotion 3D controller launches Kickstarter with dreams of replacing your mouse](#)

2013년

hulu

TV MOVIES KIDS MORE



TRY HULU PLUS LOG IN



Start Watching



+ favorite

facebook

tweet

comments (75)

Like 3.2k

2013년

2013년

TV 방송 수준에 도달할 예정인

Online 프로그램 수: 약 78개

<http://www.buzzfeed.com/charliewarzel/an-exhaustive-list-of-every-new-online-tv-show>

REUTERS EDITION: U.S. SIGN IN

HOME BUSINESS MARKETS WORLD POLITICS TECH OPINION BREAKINGVIEW

BREAKING NEWS: GM CEO Mary Barra testifies before Congress on

REUTERS VIDEO
The Latest in Business, Finance & Technology News

Disney to buy YouTube network Maker Studios for \$500 million

BY RONALD GROVER

LOS ANGELES Mon Mar 24, 2014 6:34pm EDT

12 COMMENTS | [Tweet](#) 950 | [Share](#) 601 | [Share this](#) 83 | 106 | [Email](#)
[Print](#)



2014년

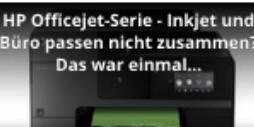
GIZMODO
DIGITAL LIFESTYLE

Suchen ...

MOBILE TECH BUZZ NEXT GAMES

 Jetzt testen:
silicon-App für Android



 Von Einhornfleisch bis Bluttapete - 28 absurde Ideen zum 1. April [Galerie]...

 HP Officejet-Serie - Inkjet und Büro passen nicht zusammen? Das war einmal...

 Diese 5 Smartphones von 2013 sind stark im Preis gesunken und immer noch top...

Gizmodo TV

ProSiebenSat.1 Media investiert in YouTube-Channelnetzwerk Collective Digital Studio



**BITS BLOG**

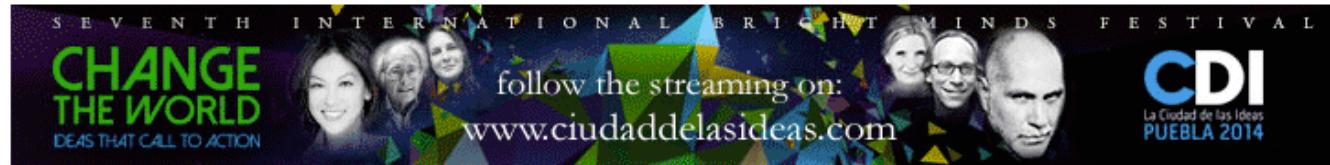
Amazon Kindle Voyage, a High-End E-Reader That Beats Hardcovers

Spotify Introduces a Family Discount for Music Streaming

Gannett Reports Big Rise in Profit Fueled by TV Revenue

Tribeca Enterprises and Lionsgate to Team Up on Subscription Video

Pakistani Gov License of AR

**MEDIA**

Fullscreen Sells Control to Joint Venture Between AT&T and Chernin Group

By EMILY STEEL SEPT. 22, 2014



[The Fine Brothers](#), [Connor Franta](#) and [Our2ndLife](#) may not ring a bell to people over the age of 30.



But each of these Internet stars has millions of YouTube subscribers — crushing the 214,000 subscribers of classic youth entertainment brand MTV — and old media is paying attention.



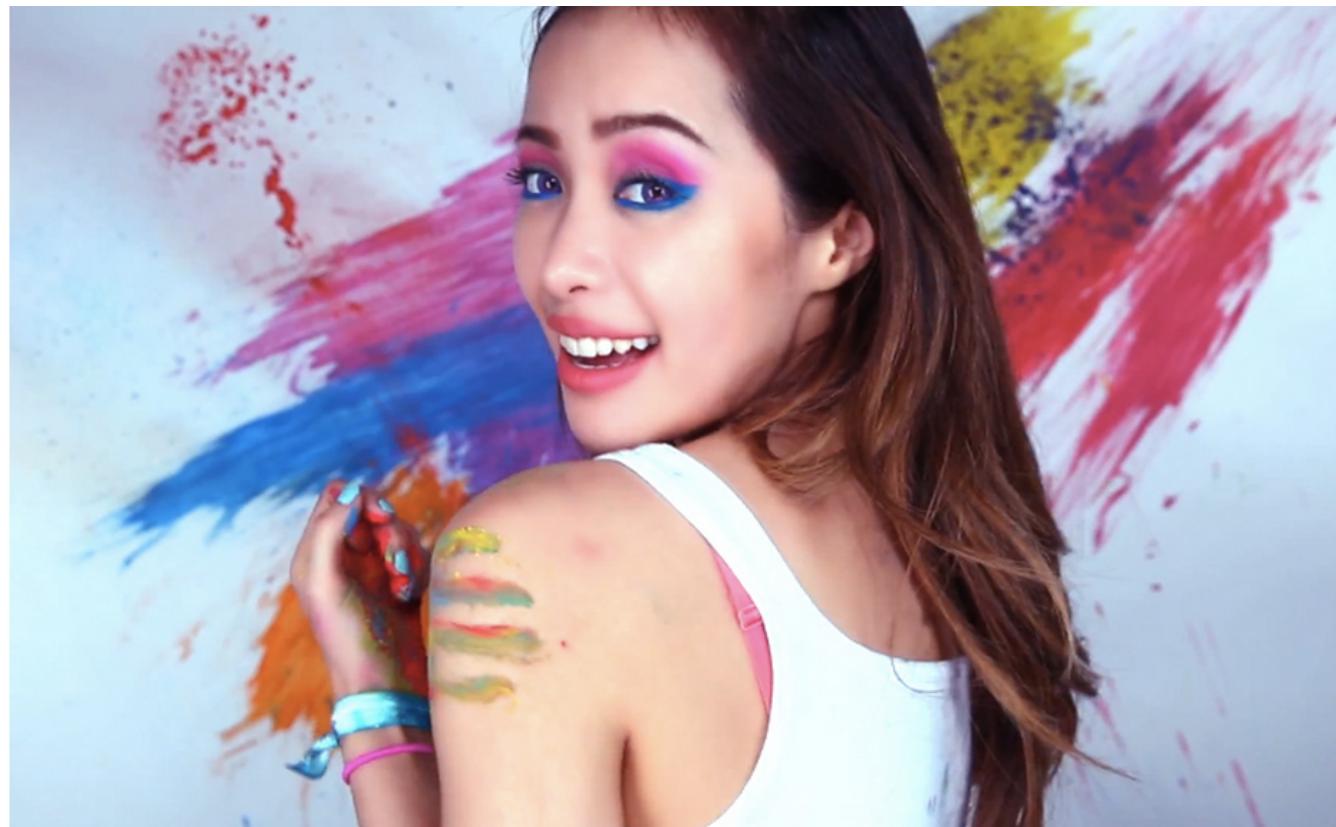
Otter Media, a joint venture between AT&T and the Chernin Group, announced on Monday that it had taken a majority stake in Fullscreen, a



2014년

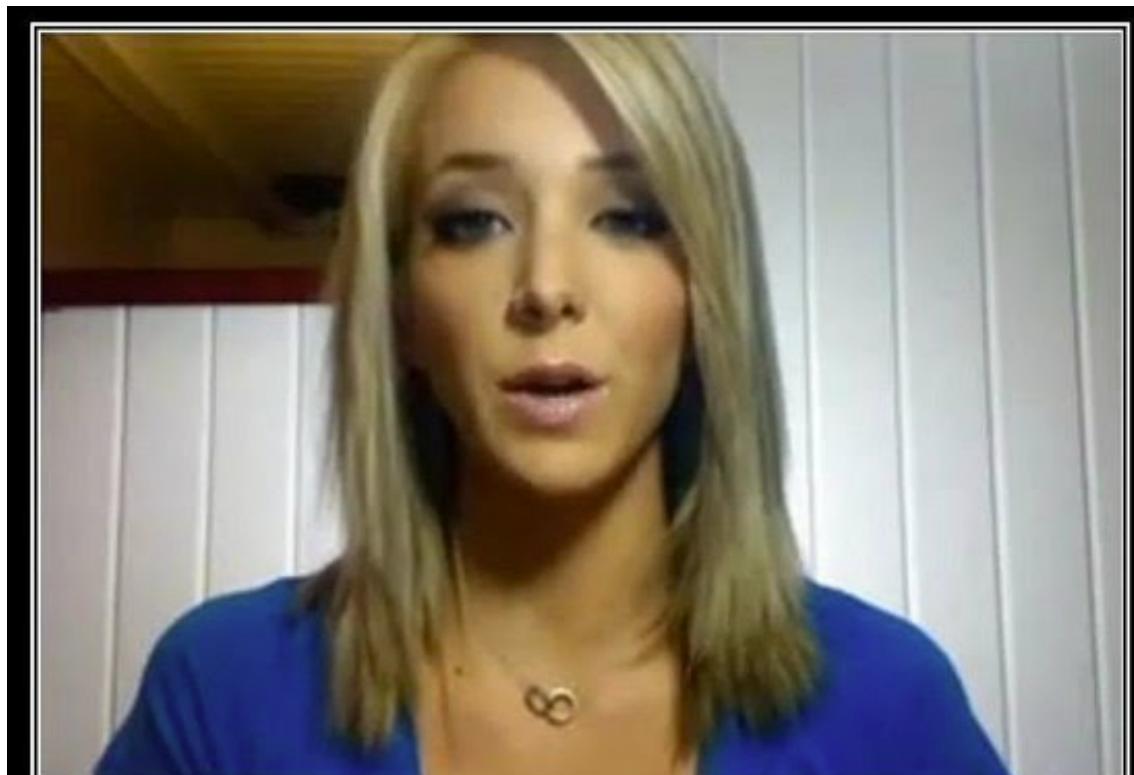
YouTube Celebrities

Michelle Phan



2006년부터, 구독자 7백만, 10억 뷰

Jenna Marbles



JENNA MARBLES

2010년부터, 14년 10월 14백만 구독자, 15억 뷰

LeFloid

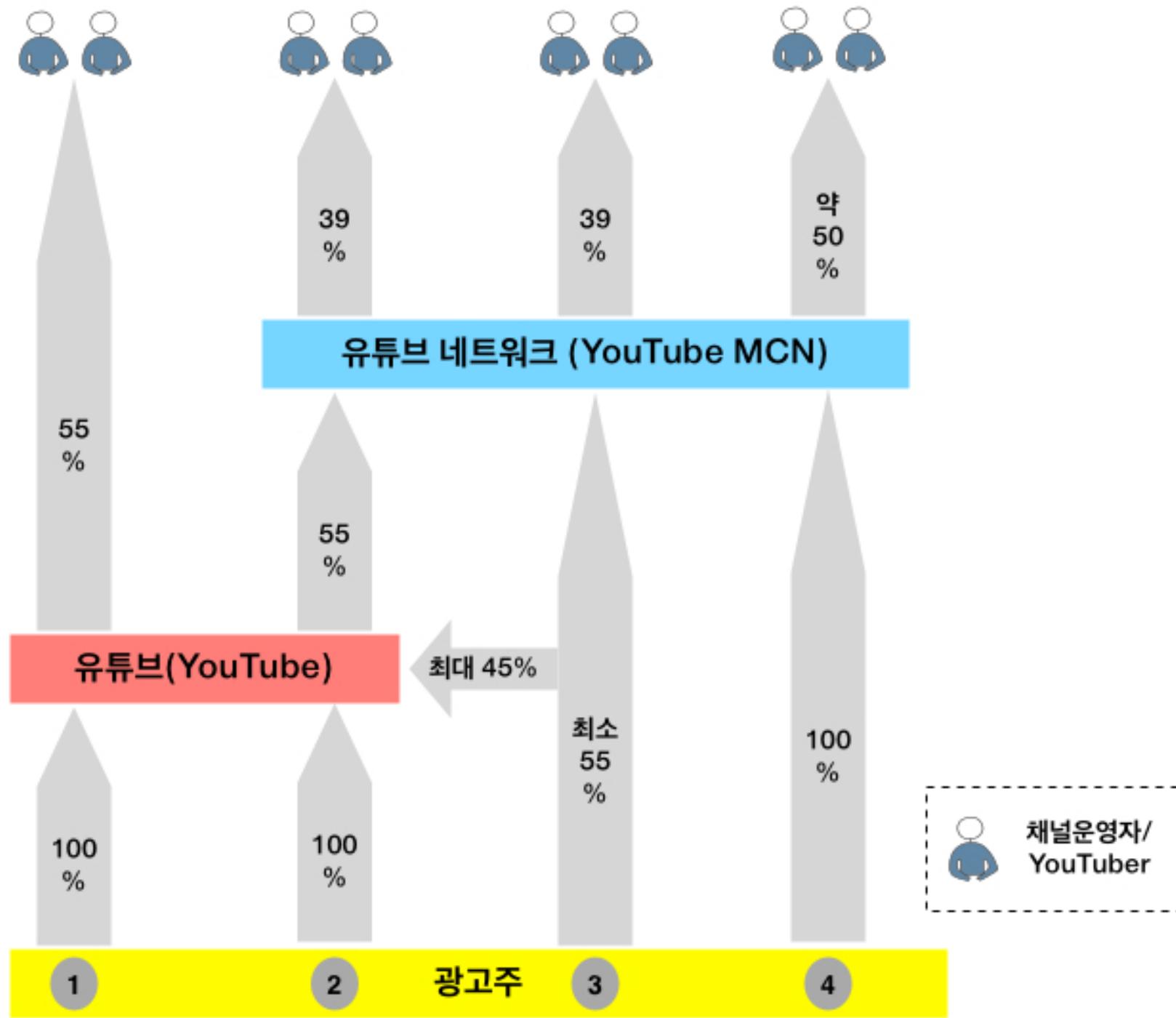


2007년부터, 구독자 210만, 2억3천만 뷰

YouTube (Multi-Channel) Network

이 름	AwesomenessTV	Fullscreen	Maker Studios	DiviMove	Studio71	Machinima
지 분	DreamWorks 100%	Comcast Ventures 등 벤처 캐피털->AT&T	Disney 100%	Bertelsmann via FremantleMedia 26%	ProSiebenSat.1 100%	Google, Warner Bros. 등 벤처 캐피 털
채 널 수	약 85,000	약 33,000	약 5,000	약 1,400	약 130	약 12,000
인 기 채 널	AwesomenessTV, Austin Mahone, jennxpenn	TheFineBros, ShaneDawsonTV, Galo Frito	Michelle Phan, PewDiePie, Epic Rap Battles, Tobuscus	Boshaft TV, Docm77, 16BARS.TV	Gronkh, SarazarLP, Kelly MissesVlog	machinima; skydoesminecraft; VanossGaming
월 방 문 자 (백 만)	약 450	약 3200	약 6,500	약 300	약 130	약 2,000
직 원 수	약 30	약 400	약 450	약 50	약 35	약 500

<http://www.editiond.co.kr/view/28>



배경

플랫폼 간접 네트워크 효과

이용자 충성도 증대 효과

저가 영상, 단편 영상 보다는 전통 TV 형식 추구

품질, 스타, 입증된 제작팀

전통 생산자로부터 독립

전통 생산자로부터 독립: 비용절감 효과

프로그램 성공할 경우 라이센스 비용 상승: 가격 악순환

참조: <http://mashable.com/2013/04/30/netflix-streamageddon-2013/>

광고 수입

YouTube, Hulu 대비 1인당 광고노출 작아

Top U.S. Online Video Ad Properties Ranked by Video Ads* Viewed				
April 2013				
Total U.S. – Home and Work Locations				
Ad Videos Only (Content Videos Not Included)				
Source: comScore Video Metrix				
Property	Video Ads (000)	Total Ad Minutes (MM)	Frequency (Ads per Viewer)	% Reach Total U.S. Population
Total Internet : Total Audience	13,256,089	5,137	81.6	52.6
Google Sites	2,417,367	212	22.7	34.4
BrightRoll Platform**	2,168,331	1,137	13.5	51.8
LiveRail.com†	1,686,142	615	20.8	26.3
Adap.tv†	1,483,369	713	13.6	35.2
Hulu	1,443,948	553	63.0	7.4
Specific Media**	1,233,788	474	11.6	34.6
TubeMogul Video Ad Platform†	818,154	270	10.2	26.0
Tremor Video**	766,697	390	12.1	20.6
NDN	529,586	143	13.4	12.8
Videology†	524,490	223	7.9	21.5

http://www.comscore.com/Insights/Press_Releases/2013/5/comScore_Releases_April_2013_US_Online_Video_Rankings%20

생태계 진화

**새로운 전문 생산자 형성 + YouTube Studio
+ Amazon Studios + ...**

YouTube MCN + Revenue Model

Global Audience Network + Global Ad. Network

BuzzFeed Motion Pictures



[CNBC: How BuzzFeed rode cute cat videos to \\$100 million](#)

August 26, 2014 - "Nobody comes to BuzzFeed or really any other site for the ads. They're coming to BuzzFeed for content and that's exactly what our ads are, it's content that is as, sometimes more, compelling than the editorial content we're producing." -Jonathan Perelman, Vice President, BuzzFeed Motion Pictures



[The Hollywood Reporter: Producer Michael Shambberg Wants to "Invent the Future" With BuzzFeed Motion Pictures](#)

August 13, 2014 - "You work in film and TV and the business model is chiseled in stone. Here, it's all an experiment to find out what the future is. And what's more exiting than feeling like you actually have a chance to invent the future?" -Michael Shambberg, film producer



[Fortune: BuzzFeed's big secret: Video is taking over](#)

August 11, 2014 - "Top executives from the media company discuss the future of BuzzFeed Motion Pictures on the back of \$50 million in new funding." - Fortune



[The New York Times: 50 Million New Reasons BuzzFeed Wants to Take Its Content Far Beyond Lists](#)

August 10, 2014 - "On Monday, BuzzFeed will announce that its new cash infusion will be used to make several major changes, including introducing new content sections, creating an in-house incubator for new technology and potential acquisitions, and putting far more resources toward BuzzFeed Motion Pictures, its Los Angeles-based video arm." - The New York Times



[Forbes: BuzzFeed Is Officially A Case Study In Media Industry Disruption](#)

July 7, 2014 - "If you only have the technology piece or you only have the editorial piece, I think it will be really hard for you to replicate the success they've had." - Felix Oberholzer-Gee, Professor of Business Administration, Harvard Business School



[Variety: BuzzFeed Inks TV Tune-In Pacts with Bravo, IFC](#)

April 10, 2014 - "Everyone talks about the two-screen experience being synchronous but it is also asynchronous. People learn about the shows they want to watch online, and after watching those shows, they go back to the web to read and share about those shows." - Jon Steinberg, President & COO, BuzzFeed



[AdAge: BuzzFeed Is About to Take Branded Cat Videos to a Whole New Level](#)

March 13, 2014 - "BuzzFeed's monthly video audience has grown from 2.2 million people in January 2013 to 4.0 million a year later, and the site peaked in May 2013 with 7.9 million viewers." -AdAge

monthly views

2013년 1월: 2백20만

2014년 2월: 1억

nearly 60% of which happens on mobile devices

multi channels

BuzzFeed Video

BuzzFeed Blue, BuzzFeed Yellow

BuzzFeed Violet, etc. 하루 평균 총 6편

수익 모델

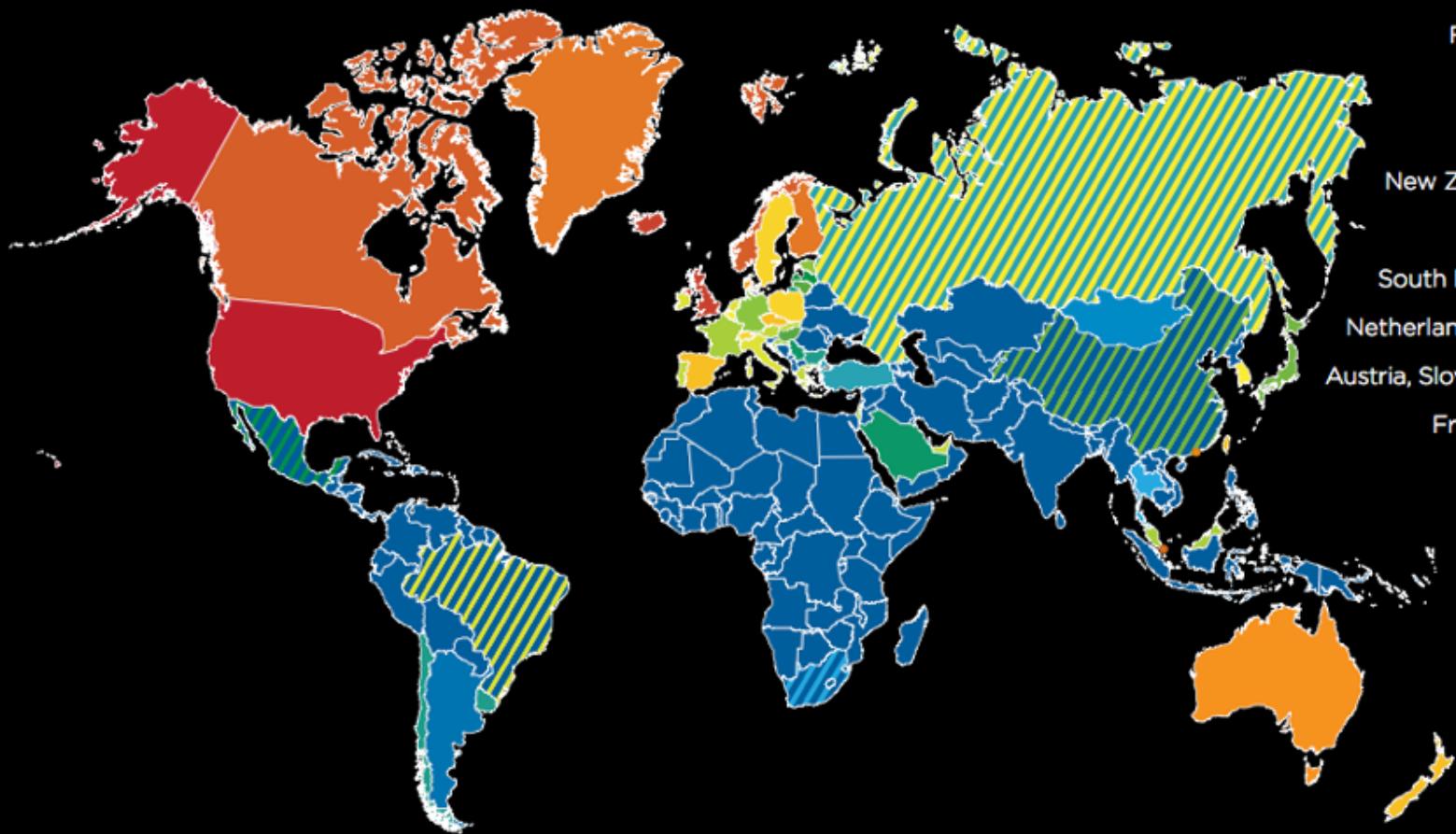
Native Ad.

PPL

디지털 뉴스 시장

Newspaper extinction timeline

When newspapers in their current form will become insignificant*



— stripes indicate that newspapers will be extinct in metropolitan areas before regional areas

newspaper as A technology

**newspaper
as A production technology**

전통 종이신문 중심 언론사 1

도달거리에 기초한 매체 영향력

도달거리에 기초한 판매수익

도달거리에 기초한 광고수익

1990년대까지 높은 수익율

생산함수로서의 종이신문 1

Positive Returns to Scale → 생산자 대형화

높은 고정 비용 → 시장 진입 장벽

경쟁 활성화 = 생산자 수 증가 = (간접) 여론 다양성 증가

정부 역할 → 경쟁시장 환경 조성위해 비용 지원

전통 종이신문 중심 언론사 2

1990년대말 월드와이드웹 대중화

One Source Multi-Use: ‘유통 채널’, ‘수입처’로 인식

2000년 - 2003년 닷컴 버블

닷컴 버블 붕괴 경기 후퇴기

생산함수로서의 종이신문 2

판매량 감소 → 높은 고정비용으로 생산함수 문제 발생

일정 생산량 유지 못할 경우 → 생산함수 작동하지 못함

판단 사항: 일시적 위기인가? 구조적 위기인가?

일시적 위기 → 정부역할: 종이신문 지원 강화

‘규모의 경제’의 배신 1

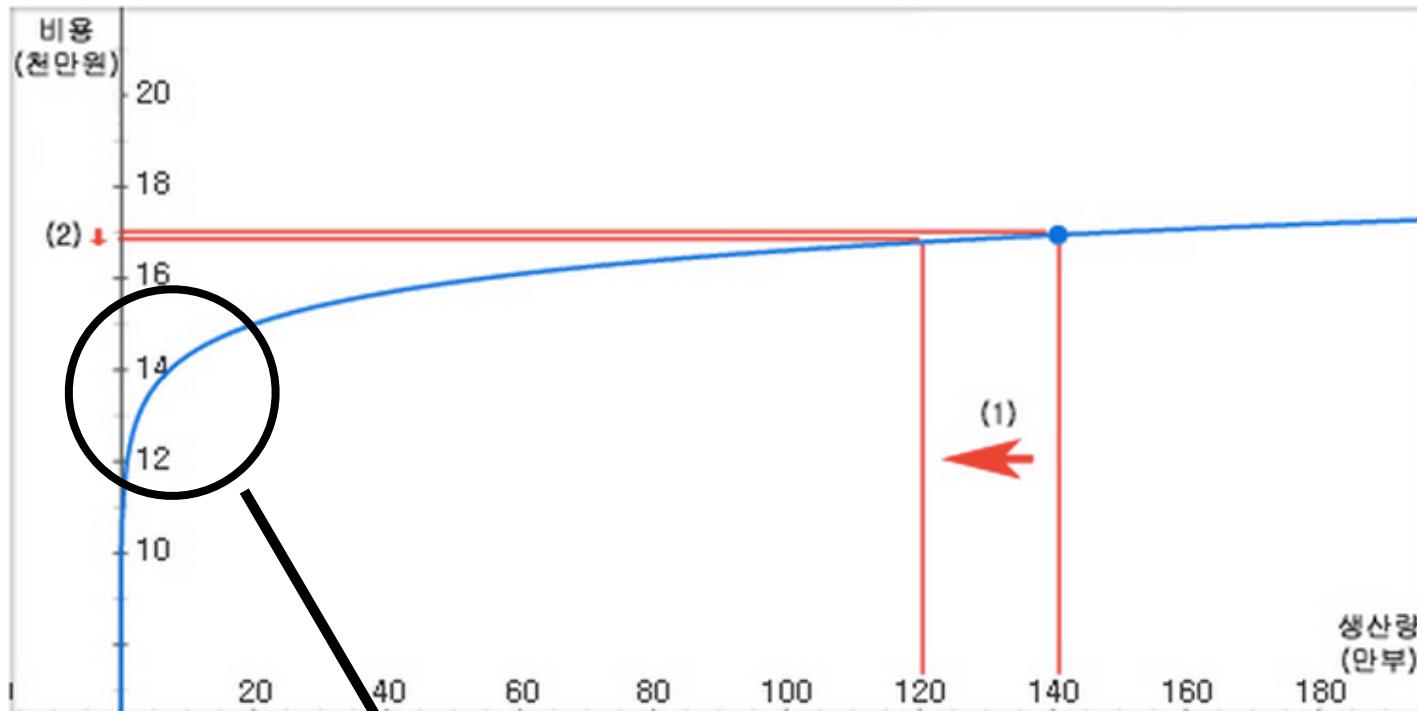


그림 1: 종이신문의 생산/비용함수(그림: 강정수)

프레더릭 피유(Frédéric Filloux):

전체 비용 중 종이 및 인쇄 비용 ▶ 약 25%-35%
전체 비용 중 배달 및 유통 비용 ▶ 약 30%-40%

‘규모의 경제’의 배신 2

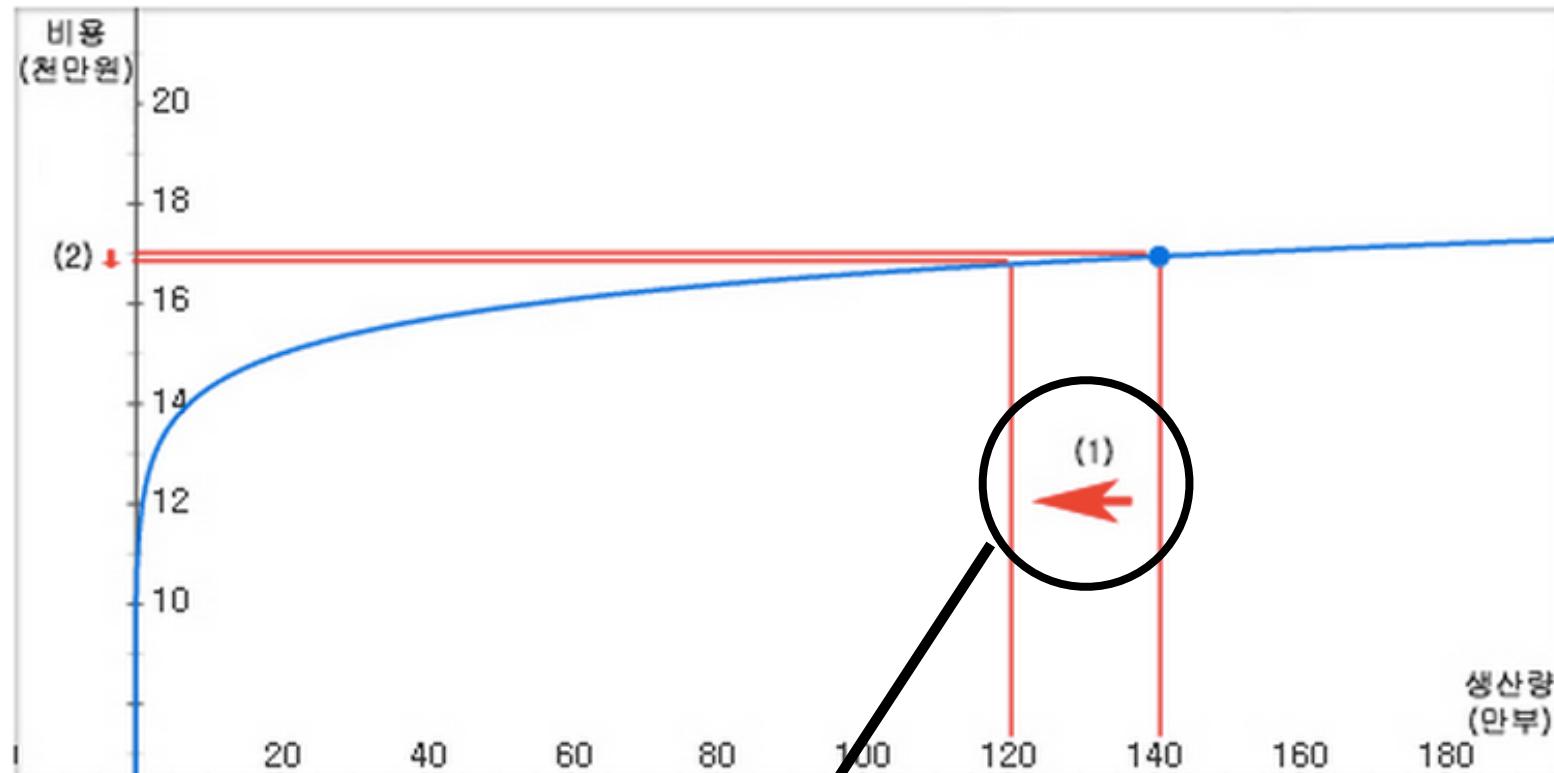


그림 1: 종이신문의 생산비용함수(그림: 강정수)

판매량 증가에 따라 수익 증가폭 매우 큼
판매량 감소에 따라 수익 하락폭 매우 큼

전통 종이신문 중심 언론사 3

2005년 전후, 네이버, 다음 급성장

월드와이드웹의 진화: 독립된 광고 시장 형성

뉴스 소비 방식의 변화

스마트 미디어 대중화 → 뉴스 소비 방식의 변화

새로운 시장의 탄생

종이신문시장과 별도의 디지털 뉴스시장 형성

뉴스 중개 서비스의 대중화

뉴스 소비의 새로운 양식을 가진 '소비자 집단' 성장

구조적 위기 → 정부역할: 전환(transformation) 지원

디지털 뉴스, 온라인 뉴스

종이신문과 다른 비용 구조 및 다른 기술

종이신문과 다른 생산함수

종이신문과 다른 상품 특성

종이신문과 다른 시장경쟁

	신문	온라인 뉴스
제품	결합 상품(Bundling): 뉴스/기사, 칼럼, 소비자 정보, 퀴즈, 운세, 광고 등이 하나의 상품으로 결합, 임의적 분할 불가능	탈결합 상품(Unbundling): 개별 뉴스/기사는 독자적 주소(URL)를 가진 독립된 상품임
접근성	패키지 가격(package price)에 기초한 일괄접근: 'walled garden'	새롭고 개인적인 '조합 가능성'이 무한대로 증가: 각각의 조합/묶음(Bundle)에서 개별 뉴스에 접근 가능
이동비용 및 교체비용 (Hotelling)	상대적으로 높음: 정기구독 해지비용, 가판 판매대 사이의 물리적 거리	매우 낮음: '클릭' 한 번 거리
생산비용 및 물류비용	두 개 모두 매우 높음	생산비용 중 노동비용은 변동없으나, 자본비용 크게 감소 + 물료비용 크게 감소

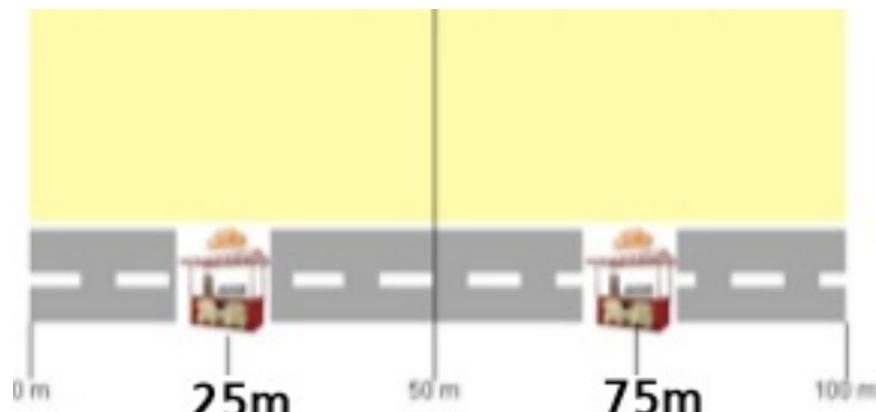


그림1

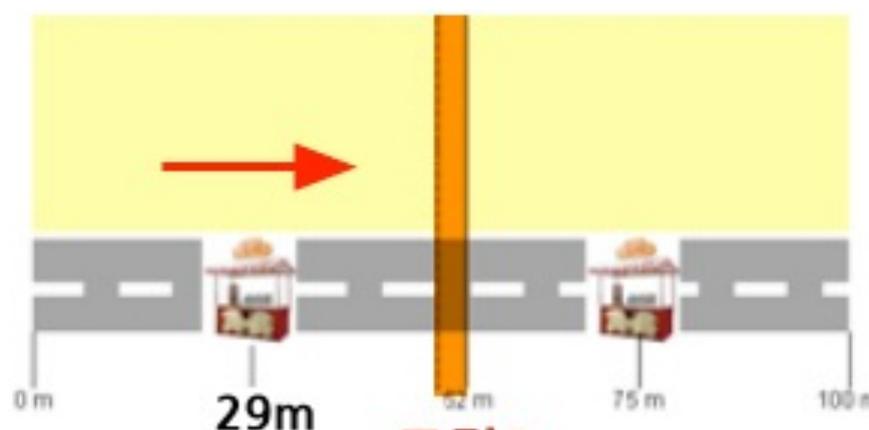


그림2

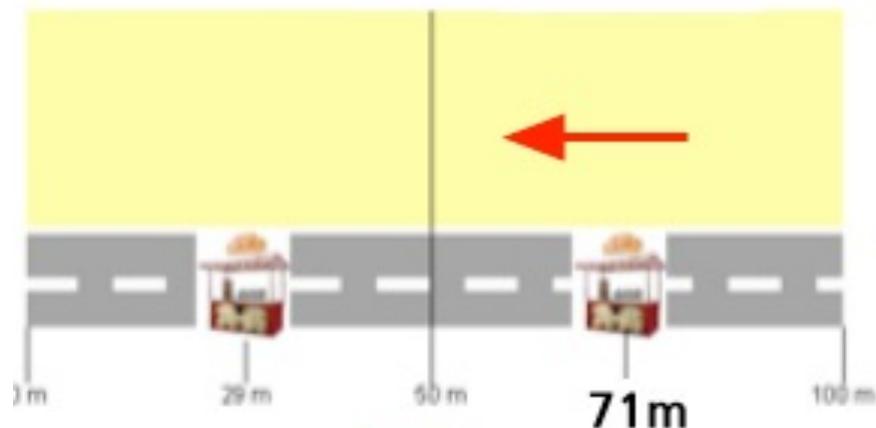


그림3

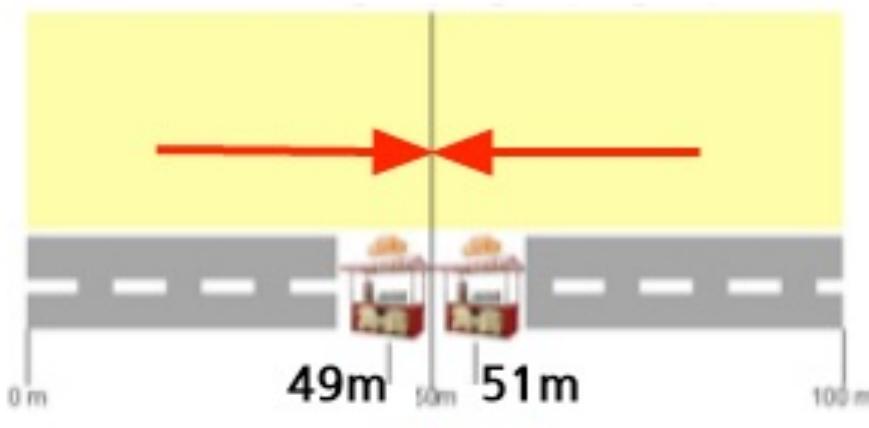
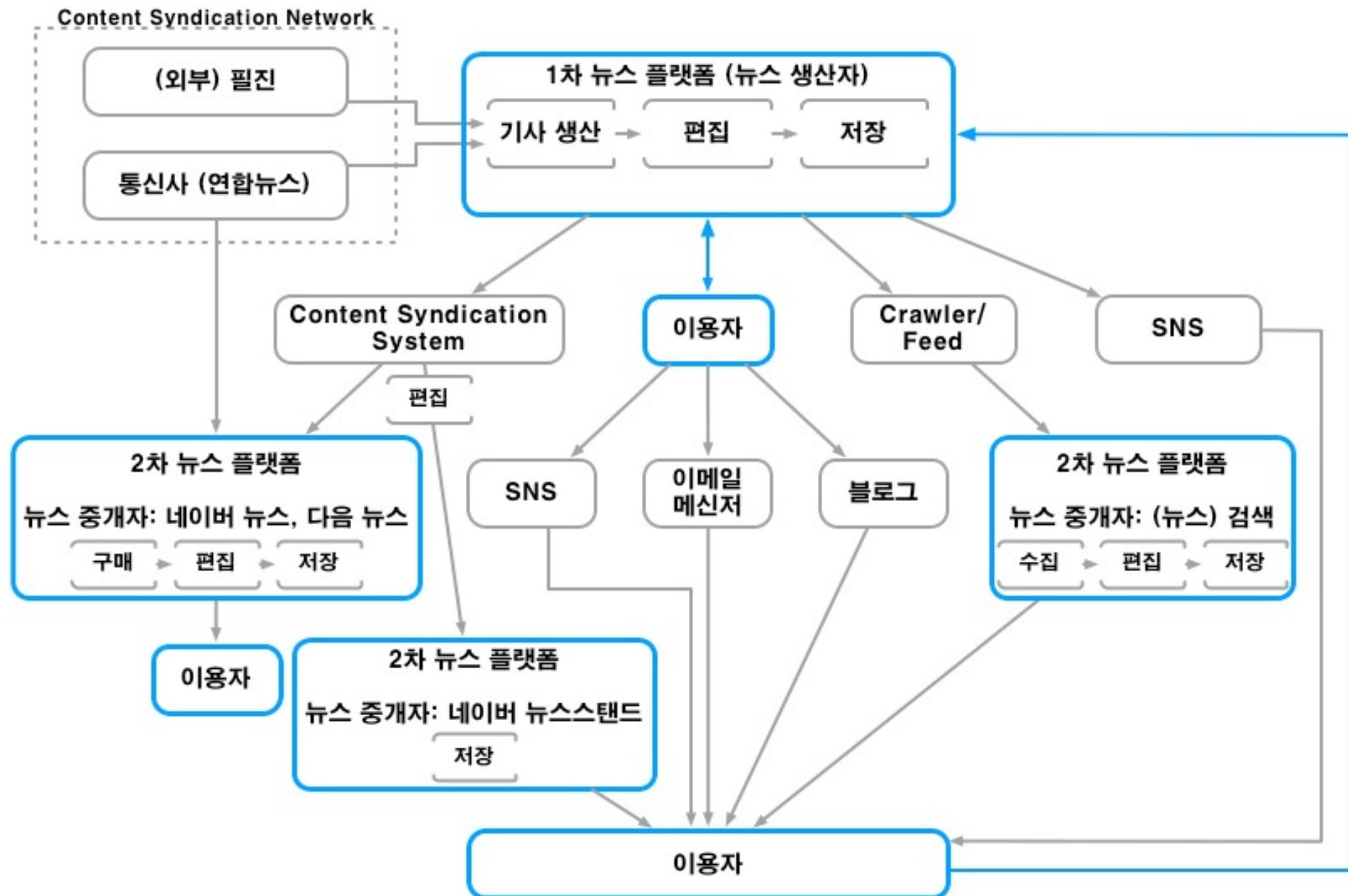


그림4



디지털 뉴스시장: 공급과잉 및 단일시장

공급과잉은 디지털 뉴스시장의 구조적 특징

공급과잉을 인정한 상태에서 시장전략 도출해야

“Content is King?” ▶ YES! BUT ...

“There are hundreds, hundreds of Kings!”

Click-Bait Journalism



실시감 급상승 검색어
뉴스 어뷰징

Click-Bait Journalism

Huffingtonpost

Buzzfeed

네이버

여부정

소설

여부정

로봇

여부정

시장 함의

1. 가치창출구조의 변화: 시장행위자 변화
2. 가치창출구조의 변화: 시장행위자 역할 변화
3. 시장환경 변화: 경쟁환경 변화
4. 정부역할 변화

뉴스 생산자와 뉴스 중개자의 갈등

종이신문 도달거리 축소 → 매체 영향력 축소
→ 판매 및 광고 축소
→ 생산함수 오작동 → 도달거리 축소

뉴스 중개자: 범위의 경제 실현 + 네트워크 효과

뉴스 중개자 → 영향력 확대, New Gatekeeper

종이신문 생산자: 디지털 뉴스시장 실패 → 갈등의 구조화

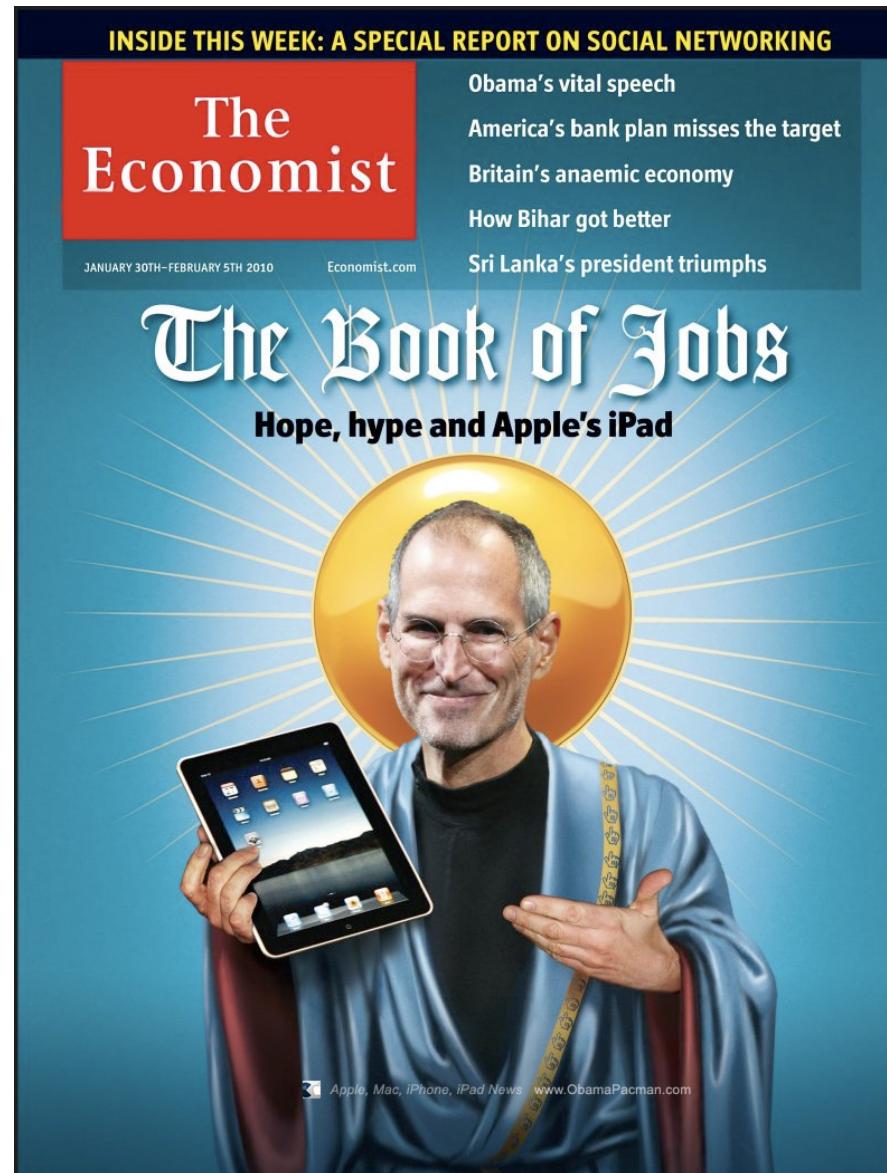
한국 저널리즘의 위기

> <http://www.berlinlog.com/?p=1121>



Why Innovation?

2010년



Mathias Döpfner (CEO of Axel Springer)

**“Every publisher in the world
should sit down every day
and pray to thank Steve Jobs!”**

Result?

Reuters Institute Digital News Report
2014, 조사대상: 11개국

New York Times Innovation Report

37%

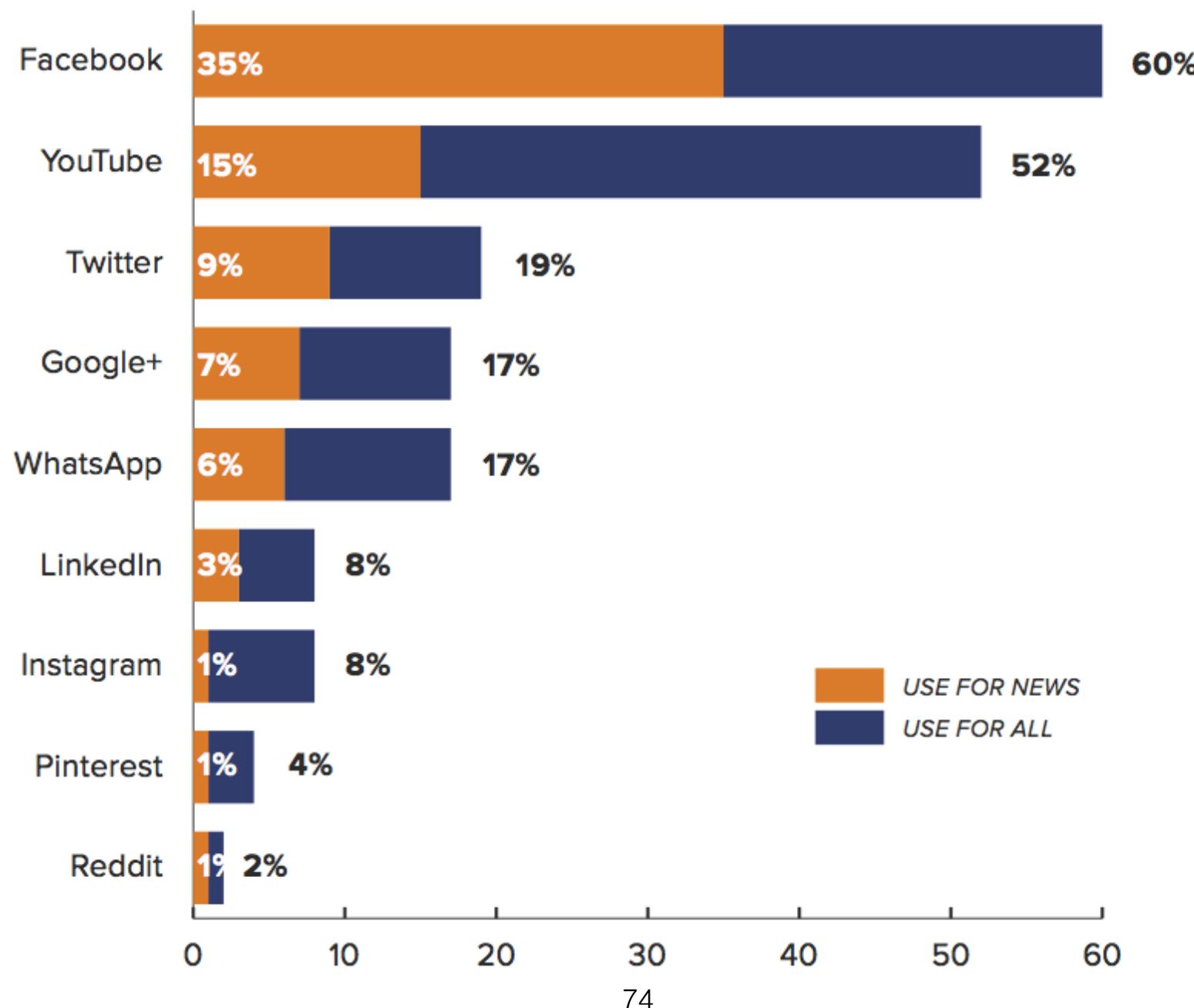
access news from
smartphone each week



55%

access one news source
weekly on a smartphone

TOP SOCIAL NETWORKS AND TOP NETWORKS FOR NEWS – ALL COUNTRIES



page

one

centric

New York Times Innovation Report

Home Page Visitors:

Millions



모바일

미디어 변동의 승자

구글

미디어 변동의 승자

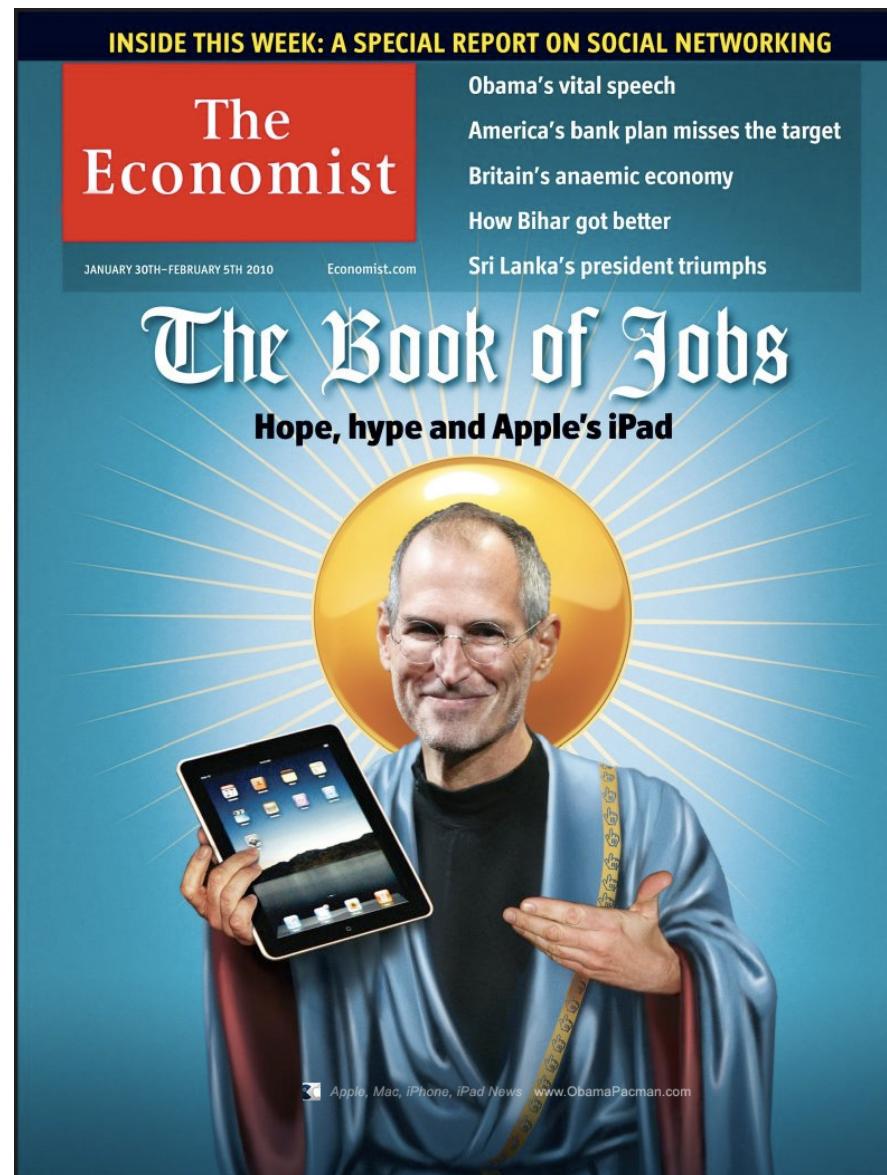
네이버

미디어 변동의 승자

페이스북

미디어 변동의 승자

오판



경쟁 강화

**Click-Bait-Sites:
Buzzfeed, Upworthy, Huff-Post, etc.**

Robot Journalism

저널리즘 혁신

생존의 문제

혁신 저널리즘의 등장

2012년을 기점으로 새로운 저널리즘 실험 이어져

12+4 혁신 저널리즘



FiveThirtyEight

 FiveThirtyEight

창업자	Nate Silver
방문자 수	180,000
페이스북 팬	5만
소셜 트래픽	20%
수익모델	기부자(Disney)
Super-Power	통계/데이터분석 전문가

NowThisNews



창업자	Kenneth Lerer
방문자 수	210,000 (웹사이트)
페이스북 팬	19만
소셜 트래픽	19%
수익모델	네이티브 광고
Super-Power	뉴스를 6초에 요약하는 능력

Vice



창업자	Shane Smith
방문자 수	3200만
페이스북 팬	260만
소셜 트래픽	50%
수익모델	네이티브/브랜드 광고
Super-Power	다큐멘터리(전쟁/갈등 지역)

















12+4

THE // INTERCEPT



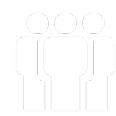
4 Areas of Innovation

저널리즘 혁신 4대 영역

기술혁신



조직혁신



형식혁신

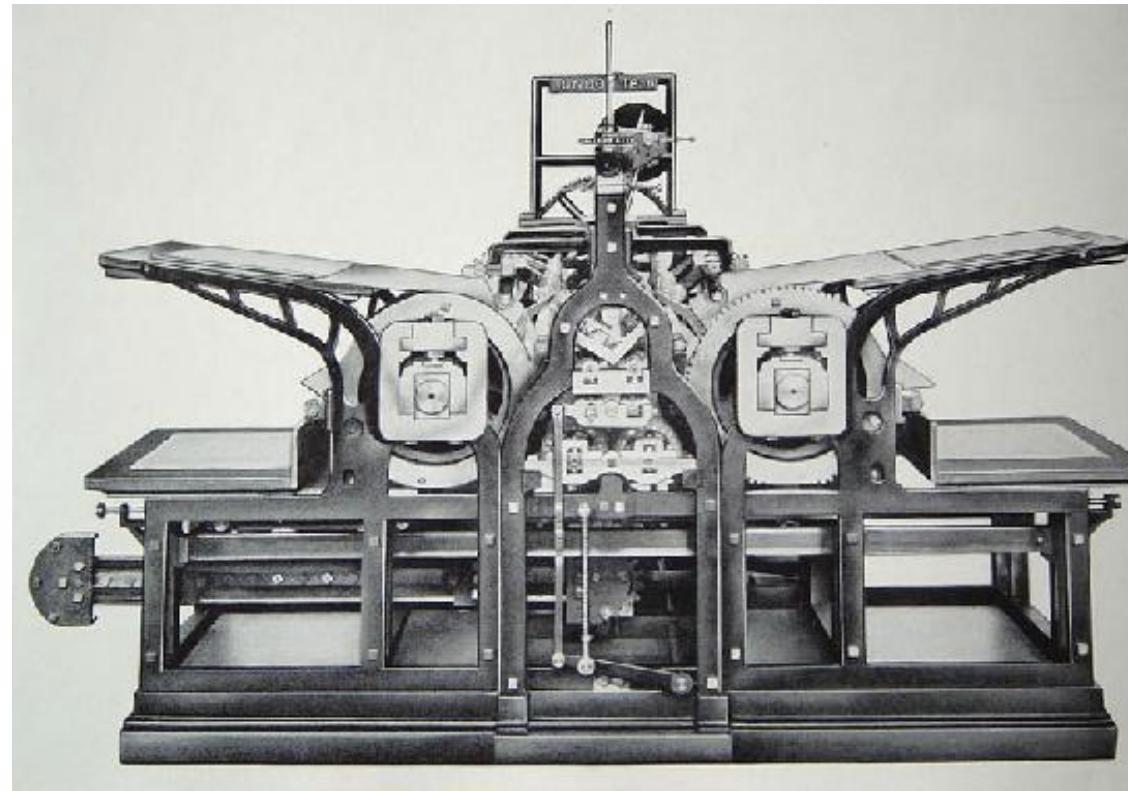


비즈니스모델
혁신



기술혁신

1814년 영국 The Times, 하루 1천 부



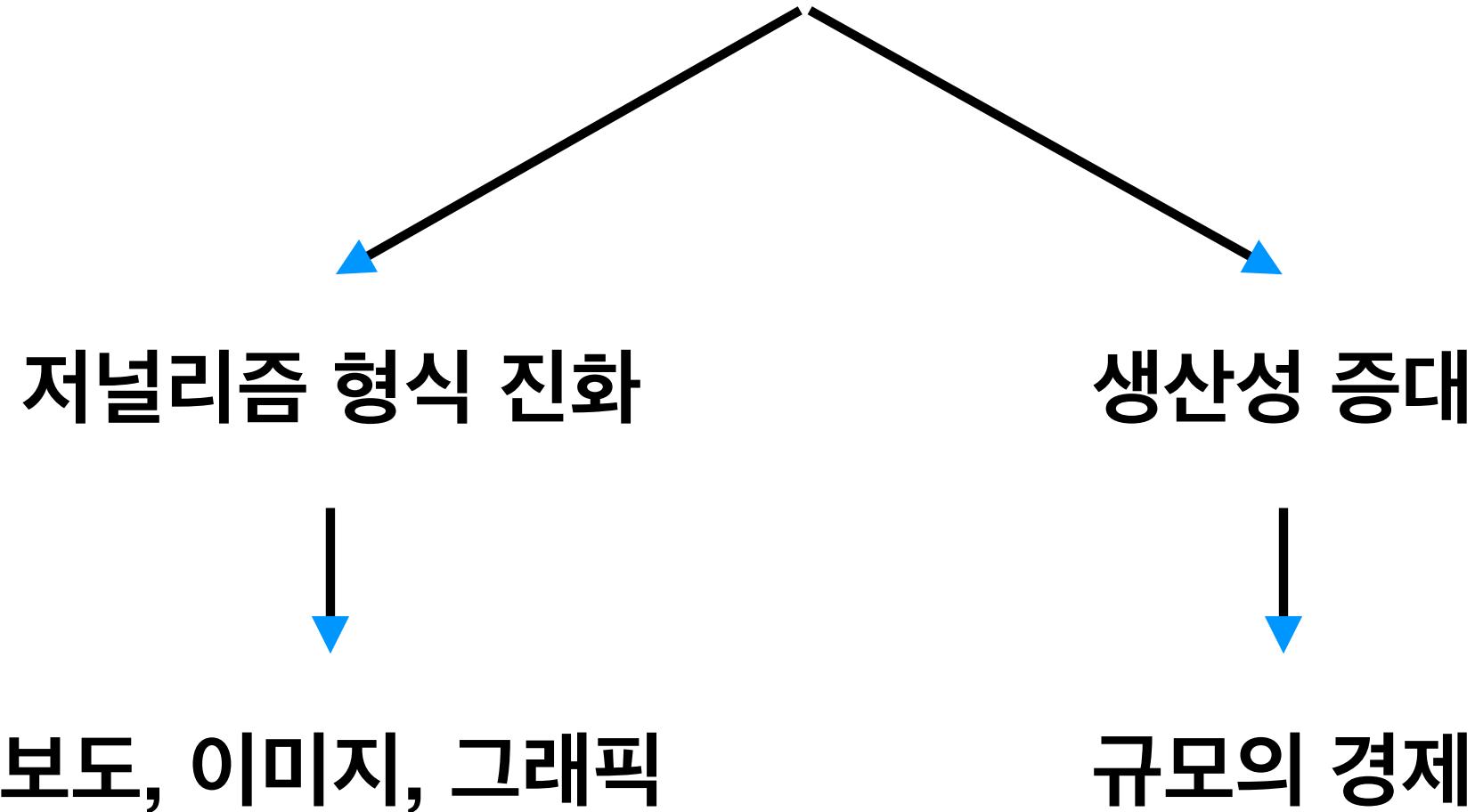
기술혁신

1817년 영국 The Times, 하루 7천 부

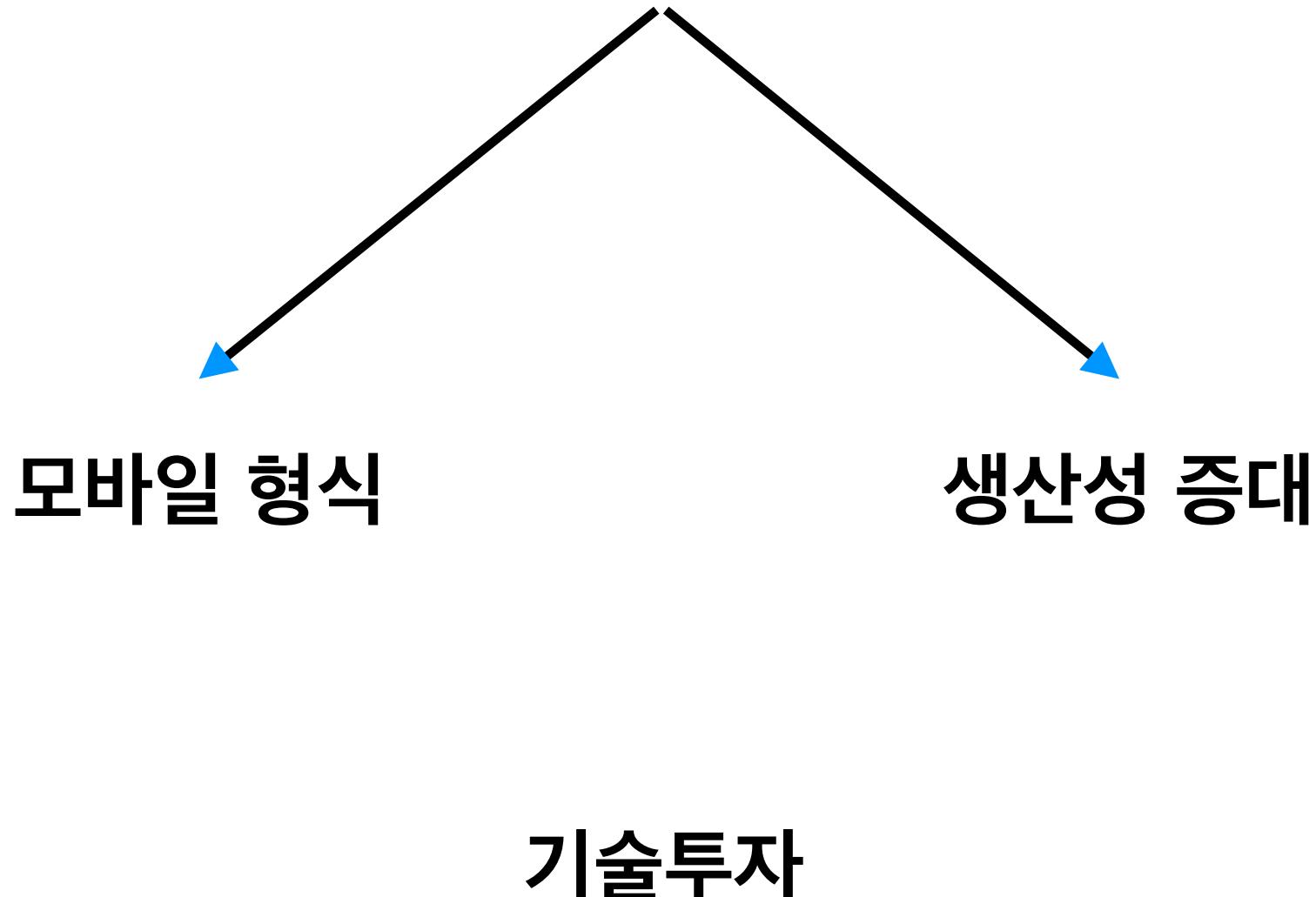
1855년 영국 The Times, 하루 6만 부

1870년 영국 The Daily Telegraph,
하루 20만 부

기술혁신



Content Management System



기술형식 + 형식혁신 + 비즈니스모델 혁신

The screenshot displays the IDEA LAB interface, which is a platform for newsroom and advertising innovations. The top navigation bar includes the IDEA LAB logo, desktop/mobile options, and categories: POPULAR, Social, Video, Infographic, Branded Content, UGC, 2nd Screen, Games, Prototypes, and GRID LIST. The interface is divided into two main sections: NEWSROOM INNOVATIONS and ADVERTISING INNOVATIONS.

NEWSROOM INNOVATIONS:

- Recession/Economy (June 2014)
- World Cup (May 2014)
- Student Loan (May 2014)
- Ground Zero (May 2014)
- Roommate A, Roommate B, Roommate C
- Divide Your Rent (April 2014)
- Map of Baseball (April 2014)
- Poetry in Prose (April 2014)
- Planet Pasta (March 2014)
- Your Own Cruise (March 2014)

ADVERTISING INNOVATIONS:

- Amex Paid Post (June 2014)
- Thomson Reuters (May 2014)
- Sotheby's Paid Post (April 2014)
- Made with IBM (April 2014)
- BMW i (April 2014)
- Vacheron Constantin (April 2014)
- Cartier NYT Now (April 2014)
- iPad Air (March 2014)
- iPhone 5 Campaign (March 2014)

기술혁신 + 형식혁신 + 비즈니스모델 혁신

Snow Fall TUNNEL CREEK TO THE PEAK DESCENT BEGINS BLUR OF WHITE DISCOVERY WORD

