

# 방송시장 변동과 혁신 저널리즘

강정수

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# **non-linear consumption**

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**“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](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**

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**original video programming**

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# **original video programming**

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**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

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

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

Share Like 1 Tweet 4 +1 0

Social Sharing...  more...



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



WEB VIDEO

# YouTube to Live-Stream the London 2012 Olympics for NBC

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

f 좋아요 198 | Tweet 391 | +1 61 | in Share 52

f Log In with Facebook Sharing TIME stories with friends is easier than ever. At your Timeline.



# 2012년

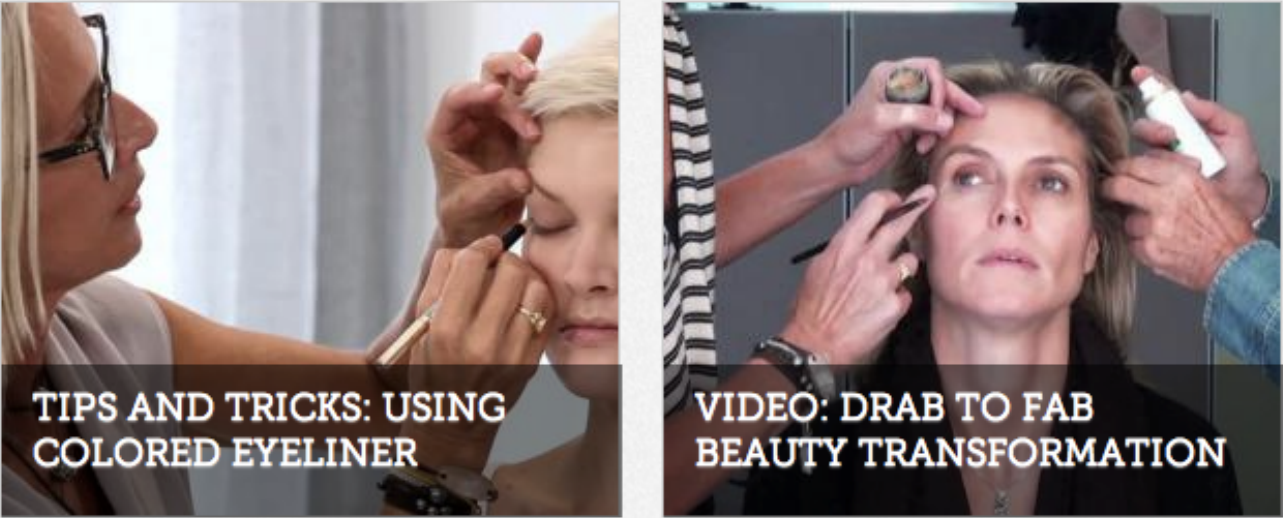
US TV company NBC has [partnered with Google-owned video service YouTube](#) to provide its video player and livestreaming infrastructure for the London 2012 Olympic Games. **Update: NBC has provided comment on its partnership, see below for more.**

Heidi Klum on Aol.

FASHION & BEAUTY ▾ FITNESS & NUTRITION ▾ LIFESTYLE ▾ PARENTING ▾

HOME

## Videos



TIPS AND TRICKS: USING COLORED EYELINER

VIDEO: DRAB TO FAB BEAUTY TRANSFORMATION

2013년

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



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

★★★★☆ (3,150 customer reviews) | 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.

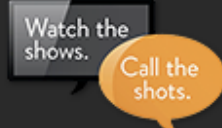
**Starring:** John Goodman, Mark Consuelos

**Directed by:** Adam Bernstein

**Runtime:** 25 minutes

**Original air date:** April 19, 2013

**Network:** Amazon Studios



#### 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\\_l\\_2?s=instant-video&ie=UTF8&qid=1370622412&sr=1-2](http://www.amazon.com/Pilot-HD/dp/B00CDBTQCW/ref=sr_l_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 Neighbour  
Participate In The Sharing  
Economy



FEATURED STORIES

SEPTEMBER 27, 2013

iMotion 3D controller launches  
Kickstarter with dreams of  
replacing your mouse. we go

# 2013년



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[t tweet](#)

[comments \(75\)](#)

[f 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>



## 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 | 106 | Email | Print



# 2014년



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

✉ Email

f Share

🐦 Tweet

📁 Save

[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

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# **YouTube Celebrities**

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# Michelle Phan

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**2006년부터, 구독자 7백만, 10억 뷰**

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# Jenna Marbles

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**2010년부터, 14년 10월 14백만 구독자, 15억 뷰**

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# LeFloid

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**2007년부터, 구독자 210만, 2억3천만 뷰**

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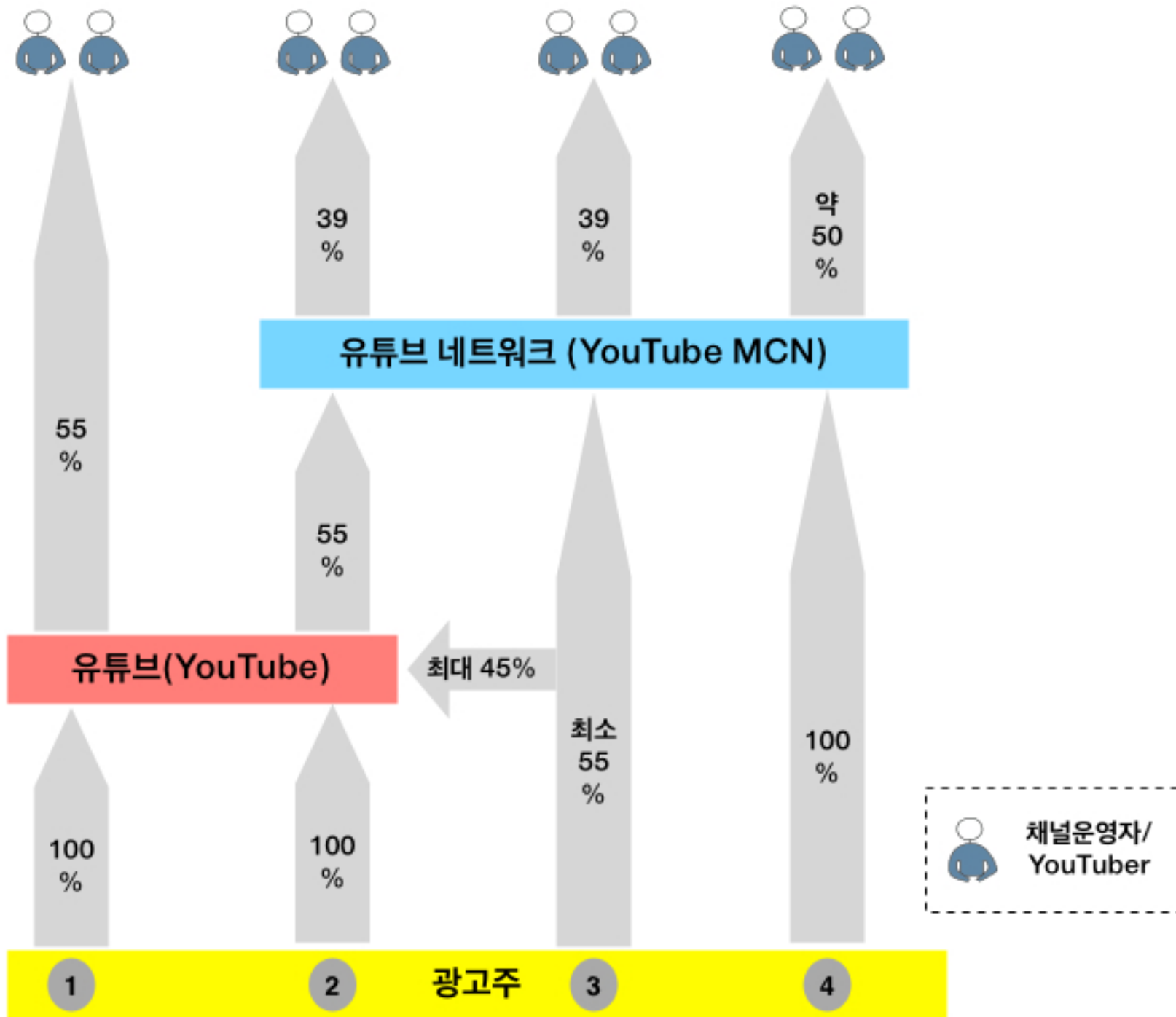
# **YouTube (Multi-Channel) Network**

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이름	AwesomenessTV	Fullscreen	Maker Studios	DiviMove	Studio71	Machinima
지분	DreamWorks 100%	Comcast Ventures 등 벤처 캐피탈->AT&T	Disney 100%	Bertelsmann via FremantleMedia 26%	ProSiebenSat.1 100%	Google, Warner Bros. 등 벤처 캐피탈
채널 수	약 85,000	약 33,000	약 5,000	약 1,400	약 130	약 12,000
인기 채널	AwesomenessTV, Austin Mahone, jennxpenn	TheFineBros, ShaneDawsonTV, Galo Frito	Michelle Phan, PewDiePie, Epic Rap Battles, Tobuscus	Bosshaft TV, Docm77, 16BARS.TV	Gronkh, SarazarLP, Kelly MissesVlog	machinima; skydoesminecraft; VanossGaming
월 방문자 (백만)	약 450	약 3200	약 6,500	약 300	약 130	약 2,000
직원 수	약 30	약 400	약 450	약 50	약 35	약 500

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



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# 배경

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# 플랫폼 간접 네트워크 효과

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이용자 충성도 증대 효과

저가 영상, 단편 영상 보다는 전통 TV 형식 추구

품질, 스타, 입증된 제작팀

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# 전통 생산자로부터 독립

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전통 생산자로부터 독립: 비용절감 효과

프로그램 성공할 경우 라이선스 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
<i>Total Internet : Total Audience</i>	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](http://www.comscore.com/Insights/Press_Releases/2013/5/comScore_Releases_April_2013_US_Online_Video_Rankings%20)

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# 생태계 진화

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

**YouTube MCN + Revenue Model**

**Global Audience Network + Global Ad. Network**

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# **BuzzFeed Motion Pictures**

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### **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 Shamberg 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 Shamberg, 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

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# monthly views

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**2013년 1월: 2백20만**

**2014년 2월: 1억**

**nearly 60% of which happens on mobile devices**

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# multi channels

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## BuzzFeed Video

**BuzzFeed Blue, BuzzFeed Yellow**

**BuzzFeed Violet, etc. 하루 평균 총 6편**

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# 수익 모델

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**Native Ad.**

**PPL**

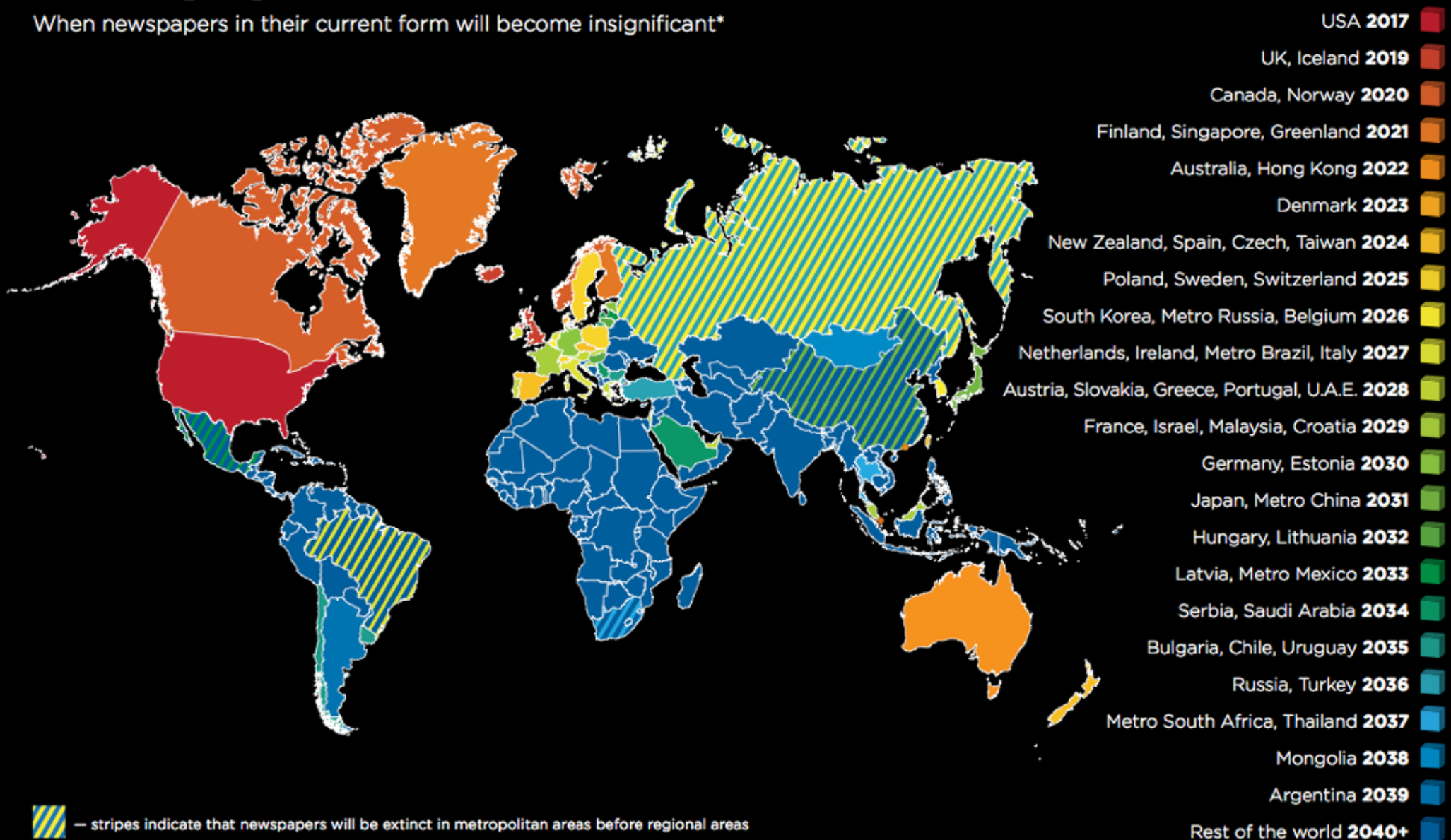
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# 디지털 뉴스 시장

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# Newspaper extinction timeline

When newspapers in their current form will become insignificant\*



**newspaper as A technology**

**newspaper  
as A production technology**

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# 전통 종이신문 중심 언론사 1

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도달거리에 기초한 매체 영향력

도달거리에 기초한 판매수익

도달거리에 기초한 광고수익

1990년대까지 높은 수익율



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# 생산함수로서의 종이신문 1

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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

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# 전통 종이신문 중심 언론사 2

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1990년대말 월드와이드웹 대중화

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

2000년 - 2003년 닷컴 버블

닷컴 버블 붕괴 경기 후퇴기

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## 생산함수로서의 종이신문 2

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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

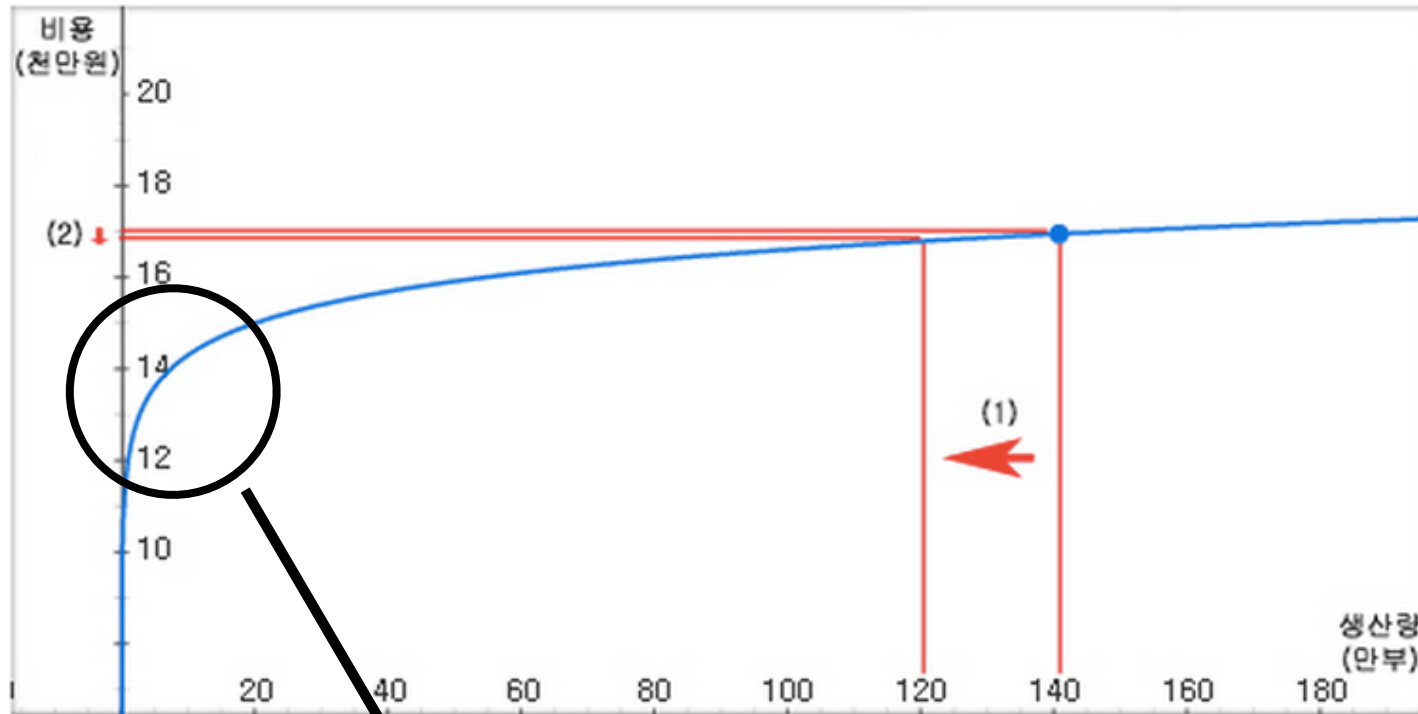


그림 1: 종이신문의 생산/비용함수(그림: 강정수)

**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

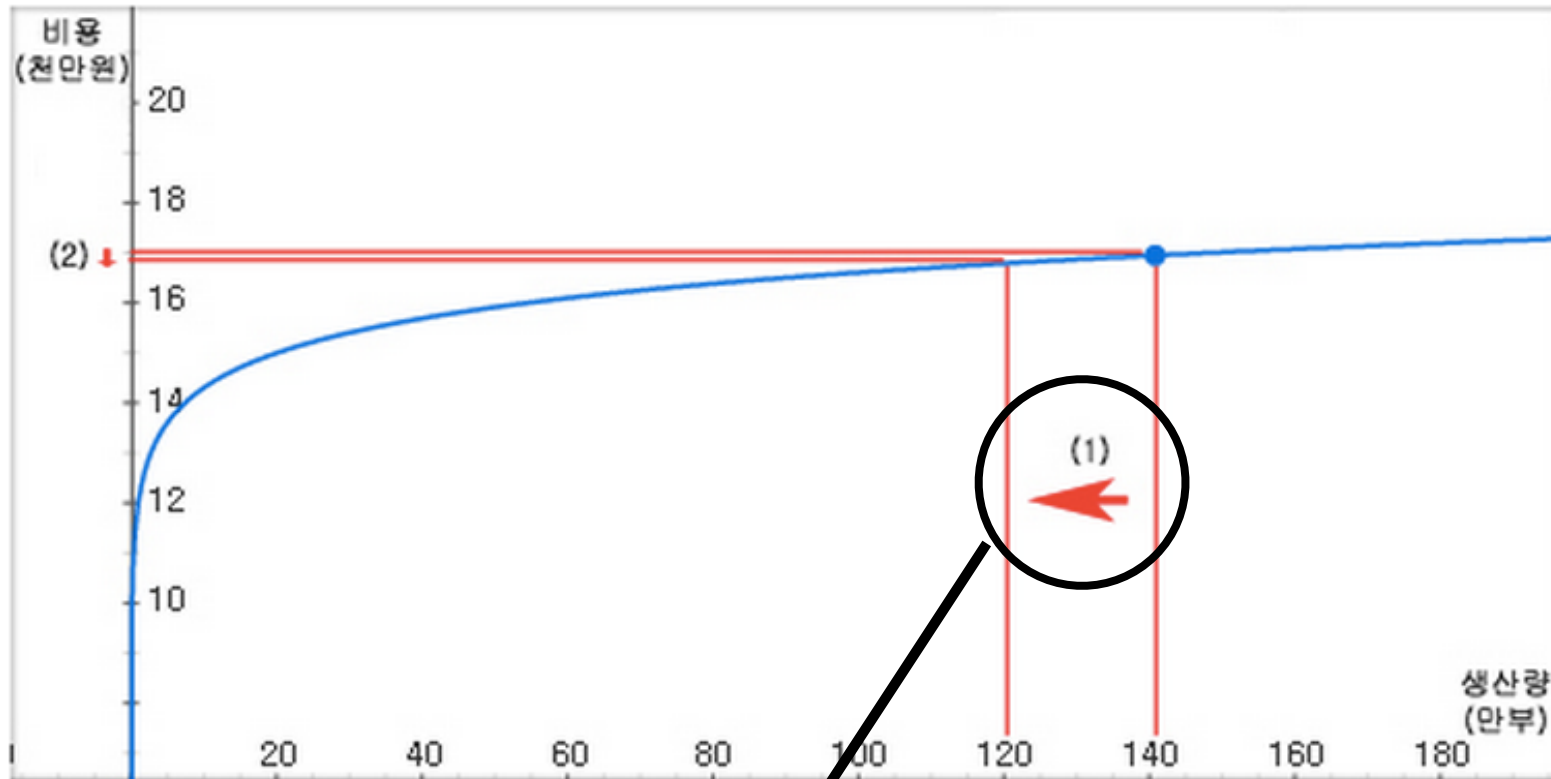


그림 1: 종이신문의 생산비용함수(그림: 강정수)

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

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# 전통 종이신문 중심 언론사 3

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2005년 전후, 네이버, 다음 급성장

월드와이드웹의 진화: 독립된 광고 시장 형성

뉴스 소비 방식의 변화

스마트 미디어 대중화 → 뉴스 소비 방식의 변화

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# 새로운 시장의 탄생

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종이신문시장과 별도의 디지털 뉴스시장 형성

뉴스 중개 서비스의 대중화

뉴스 소비의 새로운 양식을 가진 ‘소비자 집단’ 성장

구조적 위기 → 정부역할: 전환(transformation) 지원

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# 디지털 뉴스, 온라인 뉴스

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종이신문과 다른 비용 구조 및 다른 기술

종이신문과 다른 생산함수

종이신문과 다른 상품 특성

종이신문과 다른 시장경쟁



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

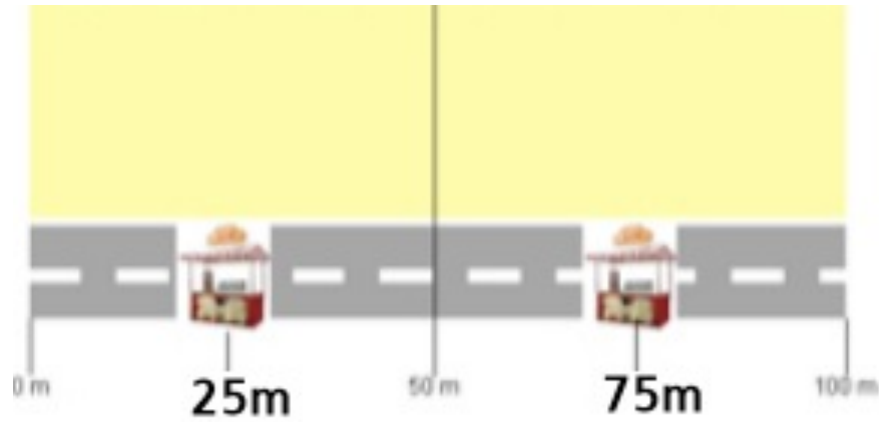


그림1

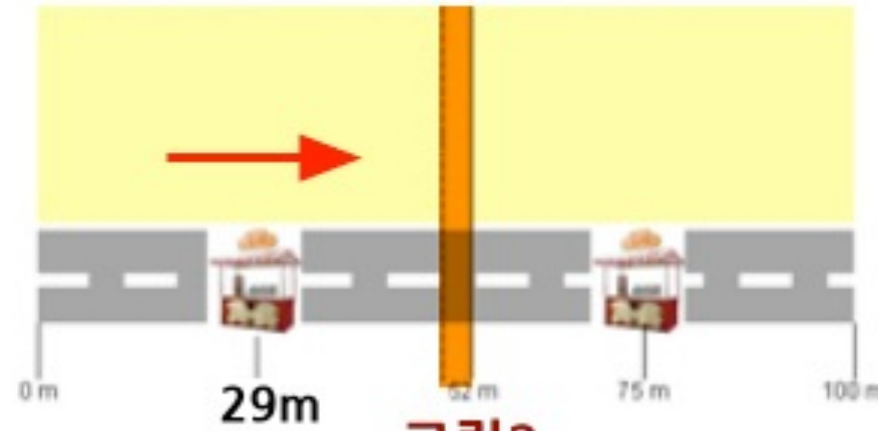


그림2



그림3

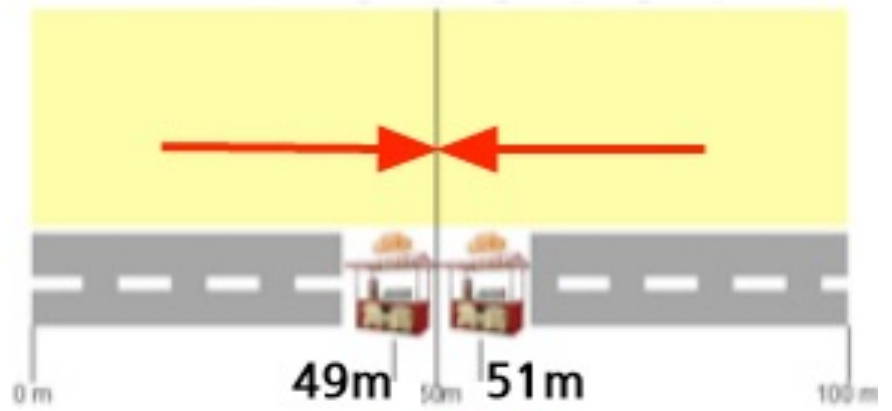
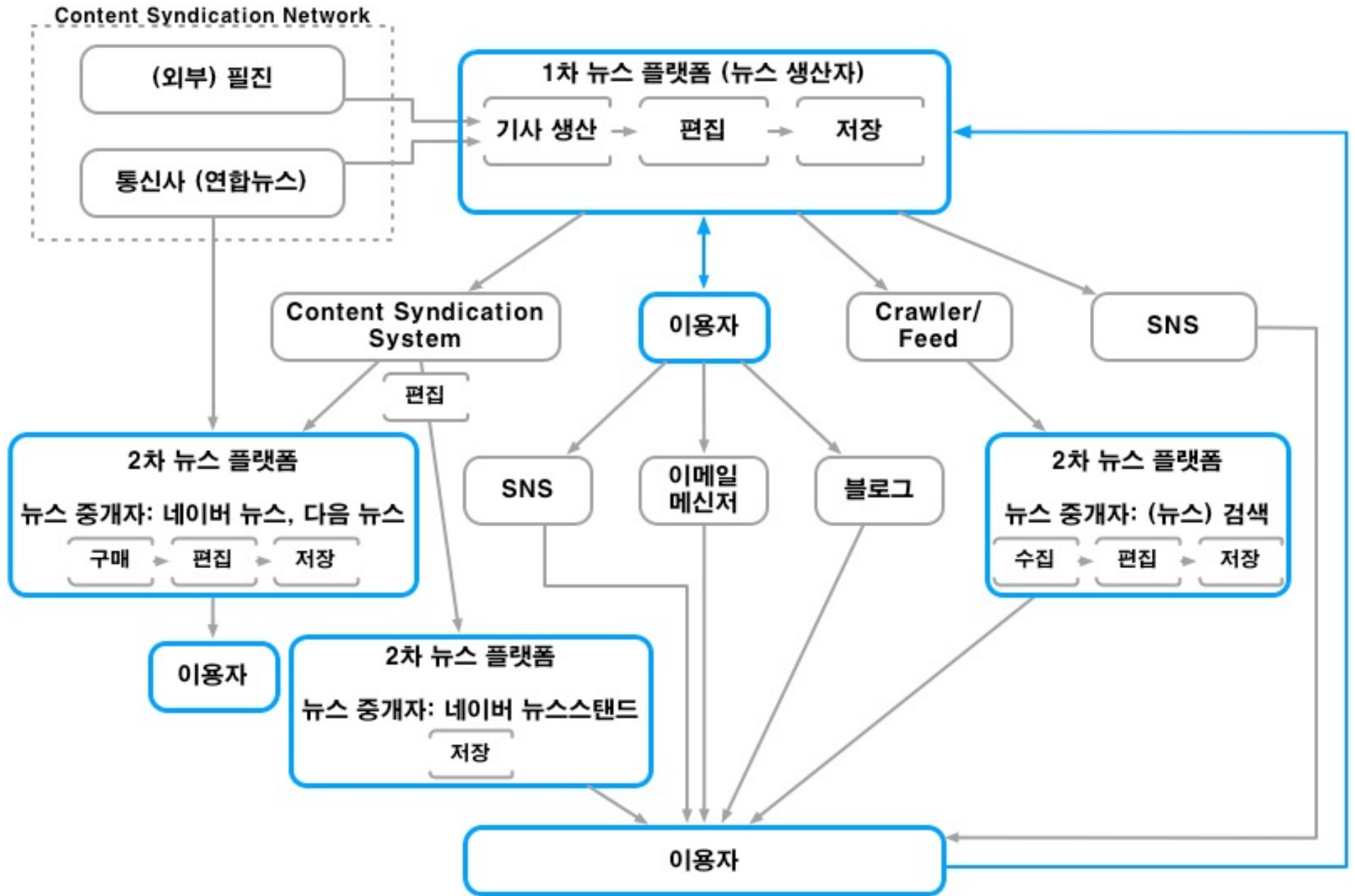


그림4



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# 디지털 뉴스시장: 공급과잉 및 단일시장

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공급과잉은 디지털 뉴스시장의 구조적 특징

공급과잉을 인정한 상태에서 시장전략 도출해야

**“Content is King?” ▶ YES! BUT ...**

**“There are hundreds, hundreds of Kings!”**

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# Click-Bait Journalism

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실시감 급상승 검색어  
뉴스 어뷰징

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# Click-Bait Journalism

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**Huffingtonpost**

**Buzzfeed**

네이버

어뷰징

**소셜**

**어뷰징**



**로봇**

**어뷰징**

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# 시장 함의

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

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# 뉴스 생산자와 뉴스 중개자의 갈등

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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>

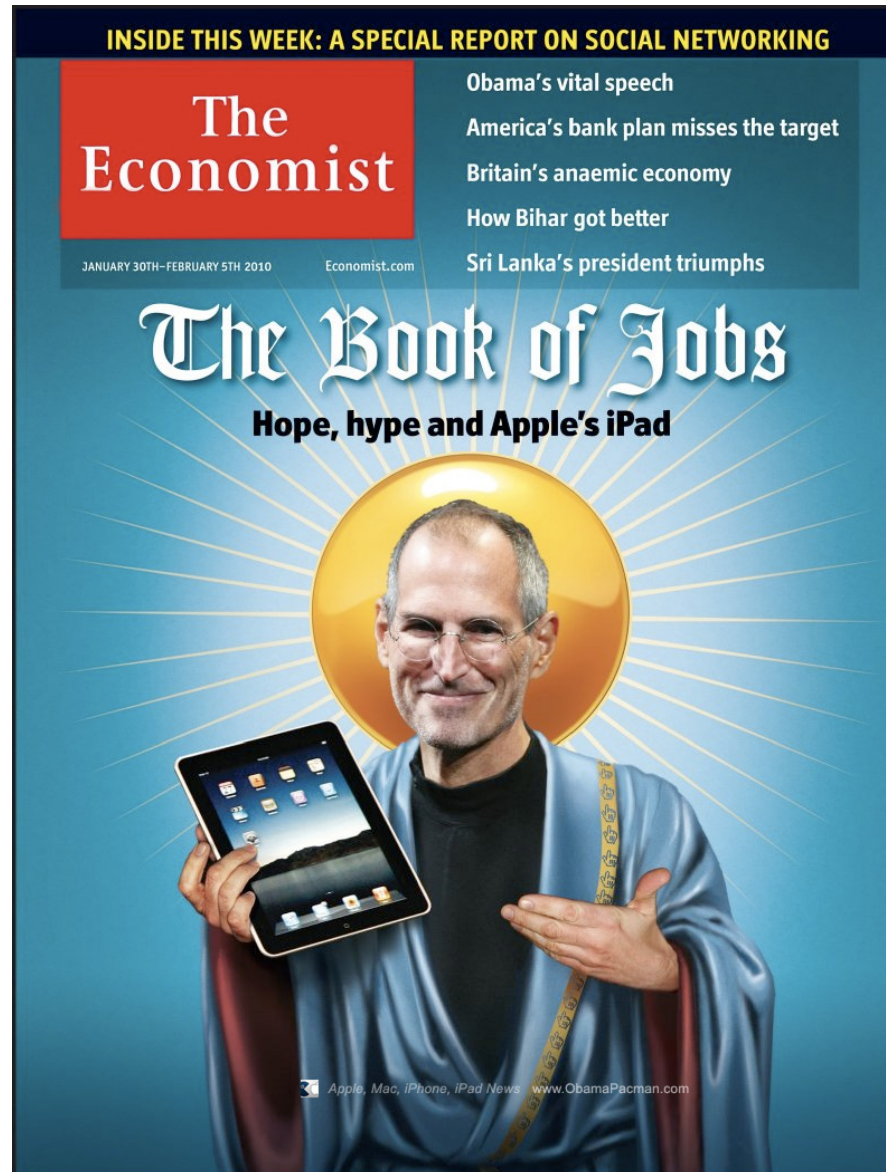


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# **Why Innovation?**

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# 2010년



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# **Mathias Döpfner (CEO of Axel Springer)**

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

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# Result?

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**Reuters Institute Digital News Report**  
2014, 조사대상: 11개국

**New York Times Innovation Report**



# 37%

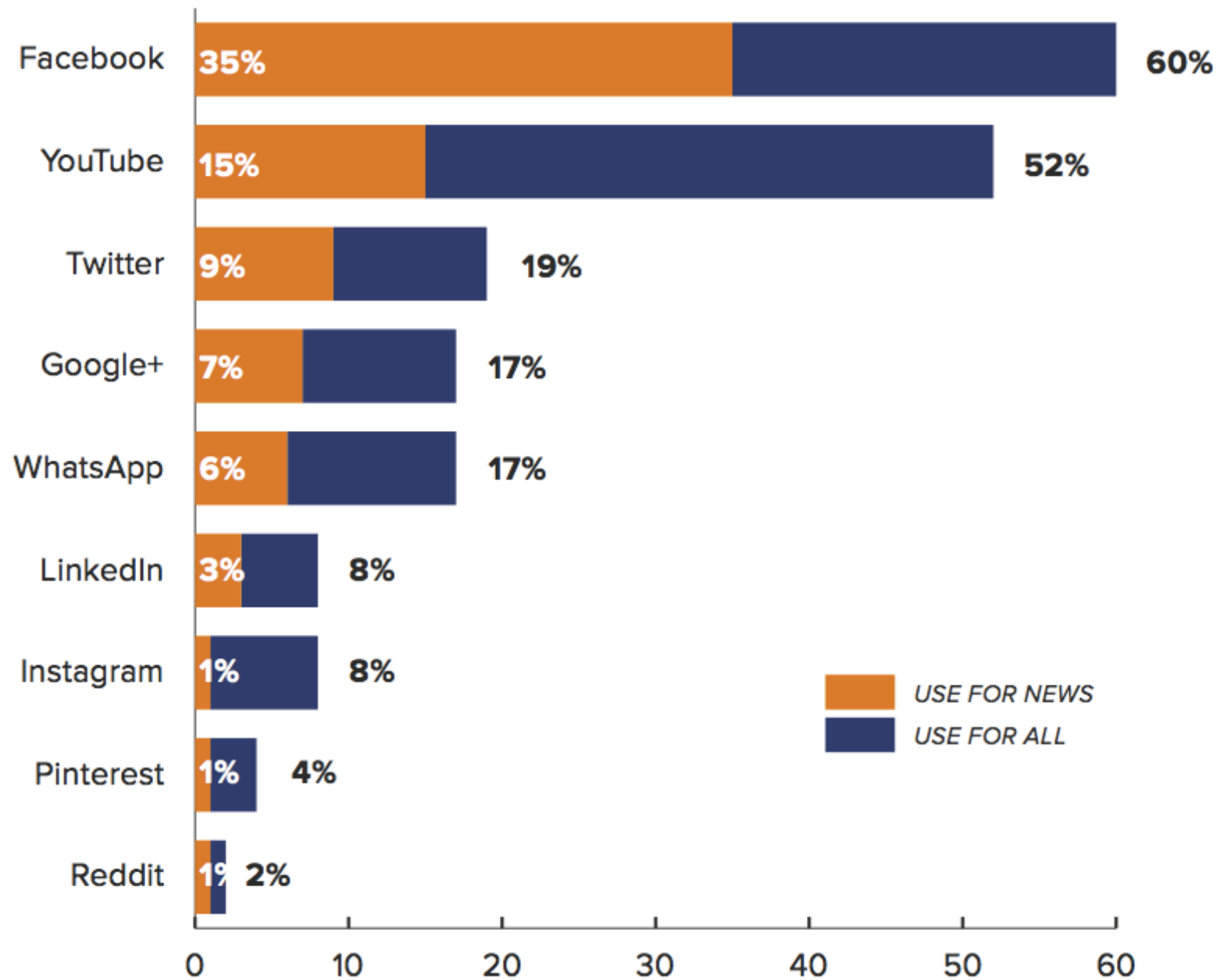
**access news from  
smartphone each week**



## 55%

access one news source  
weekly on a smartphone

# TOP SOCIAL NETWORKS AND TOP NETWORKS FOR NEWS – ALL COUNTRIES



**page**

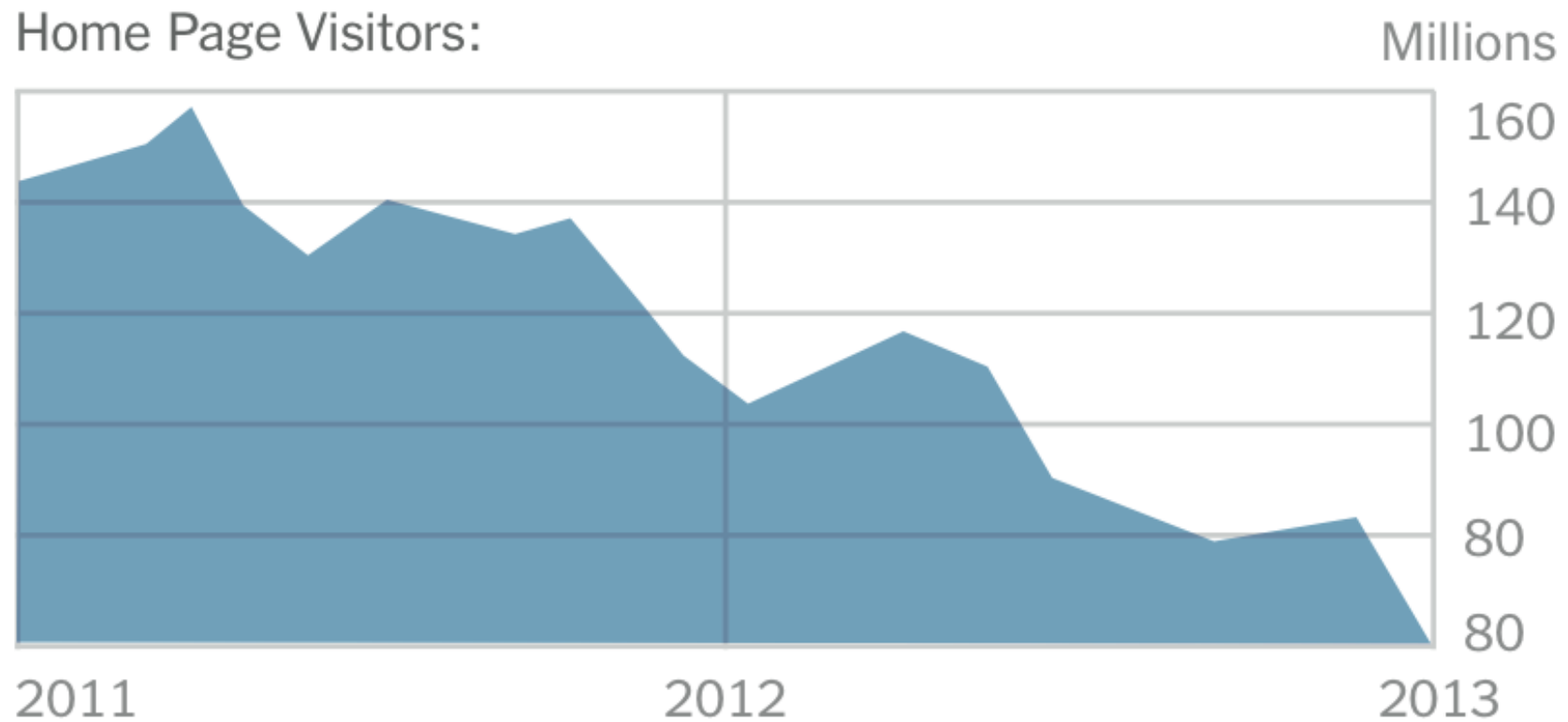
**one**

**centric**

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# New York Times Innovation Report

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# 모바일

미디어 변동의 승자

# 구글

미디어 변동의 승자

# 네이버

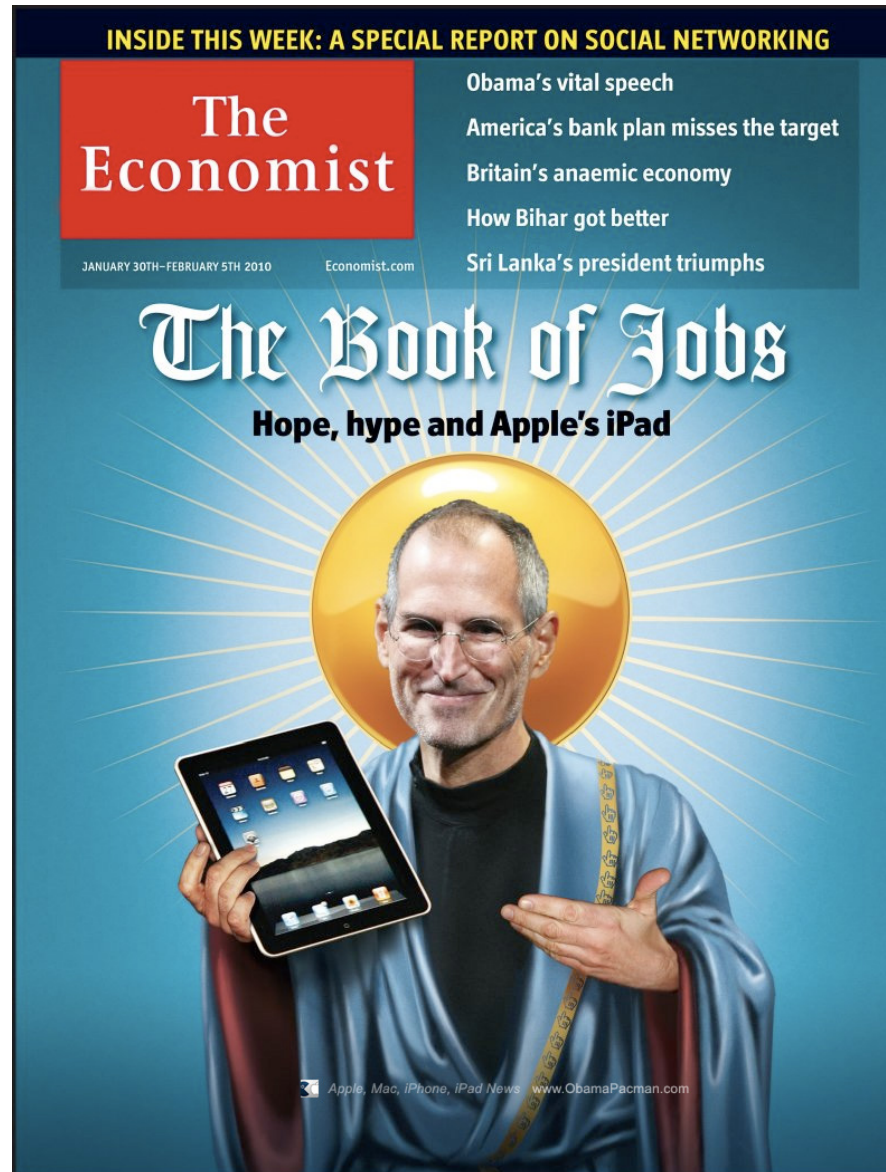
미디어 변동의 승자

# 페이스북

미디어 변동의 승자



# 오판



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# 경쟁 강화

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

**Robot Journalism**

**저널리즘 혁신**

**생존의 문제**

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# 혁신 저널리즘의 등장

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**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

# 3

**NowThisNews**



The logo for NowThisNews features the word "NOW" in white, "THIS" in yellow, and "NEWS" in white, all in a bold, sans-serif font. The text is set against a stylized background of blue, green, and grey geometric shapes that resemble a mountain or a news broadcast graphic.

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

# 4

Vice



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



# 5



# 6

### The Information



창업자	Jessica E. Lessin
방문자 수	30만
페이스북 팬	1,900
소셜 트래픽	25%
수익모델	Paid Content
Super-Power	월39달러

# 7



Circa	
<b>circa</b>	
창업자	Ben Huh
방문자 수	-
페이스북 팬	6,342
소셜 트래픽	-
수익모델	"I have no idea."
Super-Power	구조화된 저널리즘

ampp3d

**ampp3d**  
from **Mirror**

창업자	The Mirror
방문자 수	85,000
페이스북 팬	1,000
소셜 트래픽	48%
수익모델	Mirror를 접게!
Super-Power	통계와 황색지의 만남

# 10



KnowMore

**KNOW  
MORE**

창업자	Washington Post
방문자 수	180,000
페이스북 팬	12,380
소셜 트래픽	64%
수익모델	Jeff Bezos
Super-Power	지도, 통계





# 12+4

## THE // INTERCEPT

*de  
Correspondent*



**Der Postillon**

Ehrliche Nachrichten - unabhängig, schnell, seit 1845



**slow news**

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# **4 Areas of Innovation**

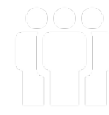
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# 저널리즘 혁신 4대 영역

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기술혁신



조직혁신

형식혁신



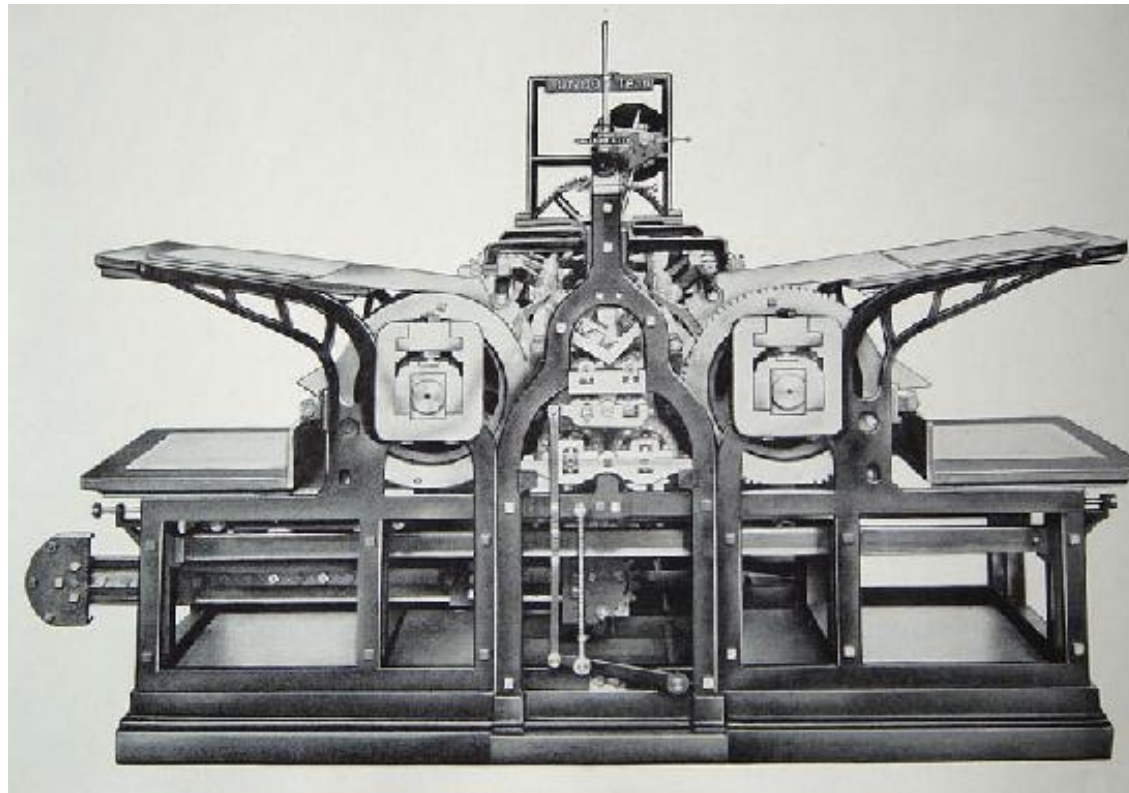
비즈니스모델  
혁신

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# 기술혁신

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1814년 영국 The Times, 하루 1천 부



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# 기술혁신

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**1817년 영국 The Times, 하루 7천 부**

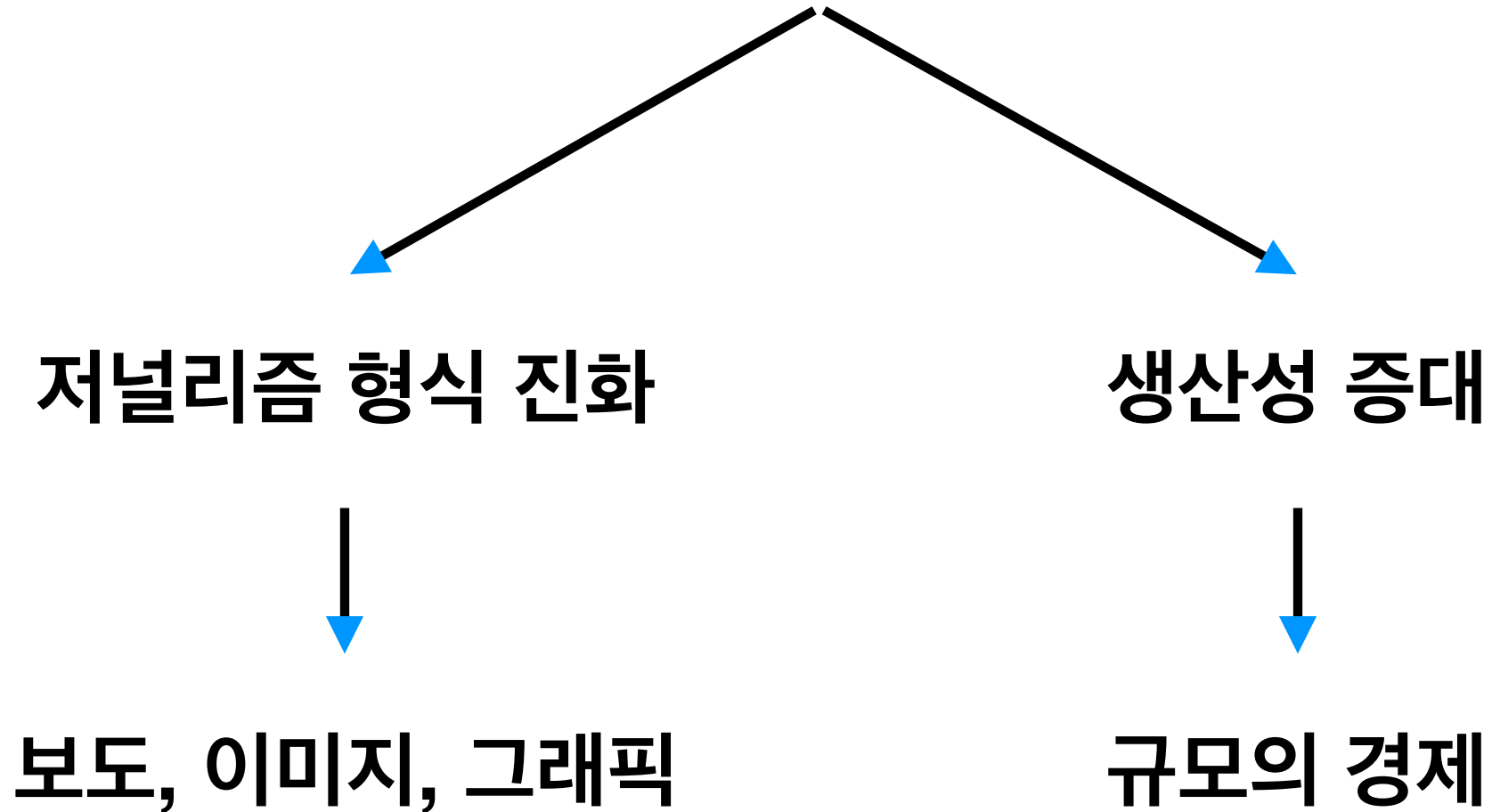
**1855년 영국 The Times, 하루 6만 부**

**1870년 영국 The Daily Telegraph,  
하루 20만 부**

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# 기술혁신

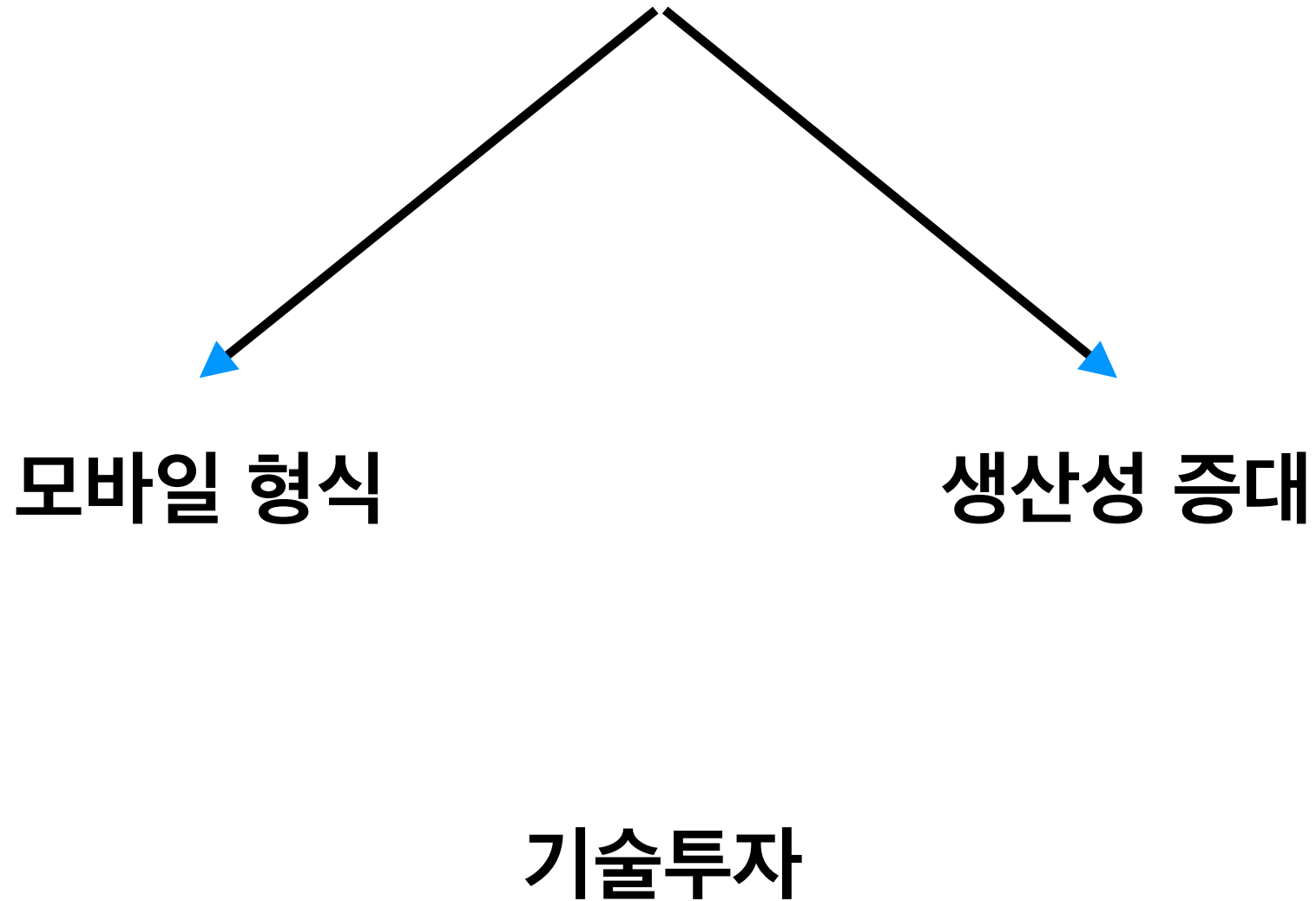
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# Content Management System

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# 기술형식 + 형식혁신 + 비즈니스모델 혁신





# 기술혁신 + 형식혁신 + 비즈니스모델 혁신

