



Digital Media: Becoming platform agnostic about content

Korea – Australia Broadband Summit
Seoul, Korea
9-10 June 2005

Rohan Lund
Head of Strategy & Investments
Seven Network Limited

Seven Network Limited

- No.1 or 2 for ratings (36%)
- Largest broadcast reach (75%)
- 9 out of every 10 Australians tune into Seven every week
- Largest producer of local content

Free-to-air
Television



Digital Media?

Magazines

Girlfriend.com.au
make us your homepage!

New Idea

marie claire

Events

ticketmaster 7

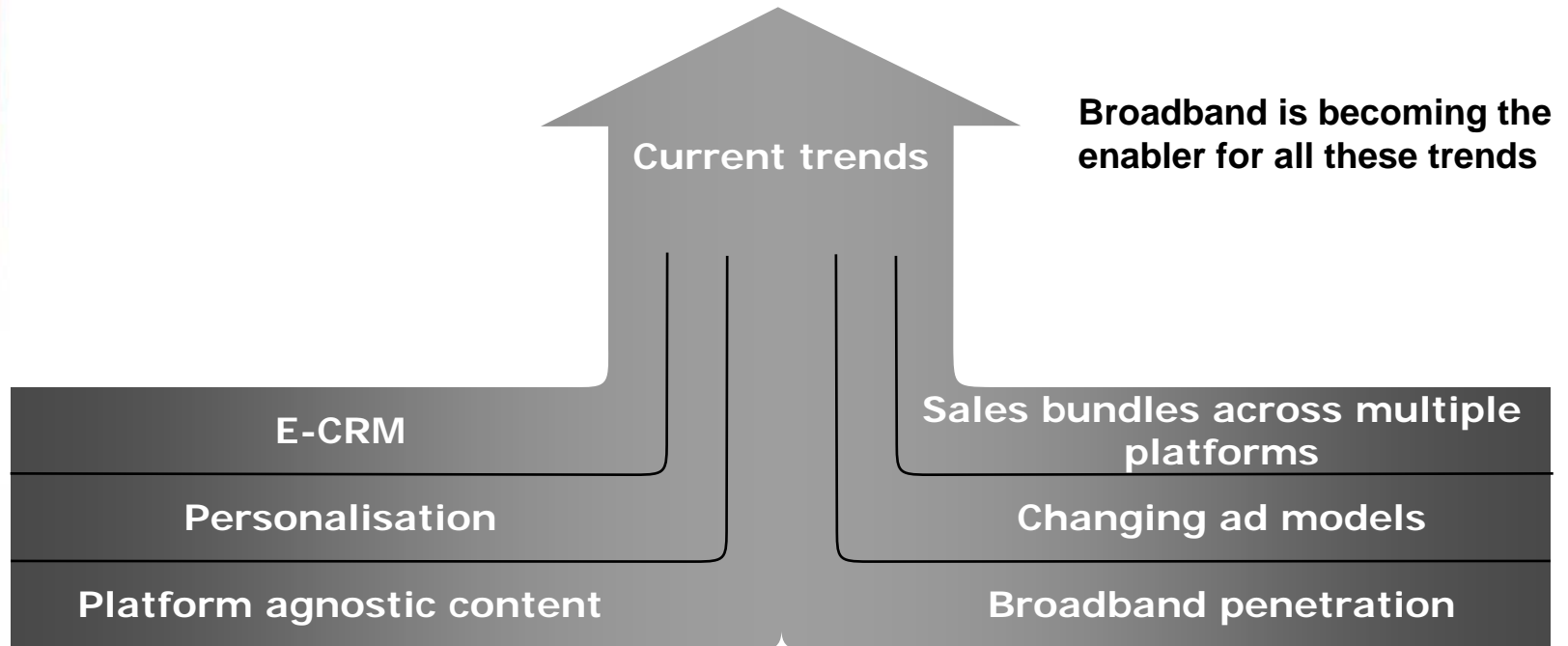
talentWORKS



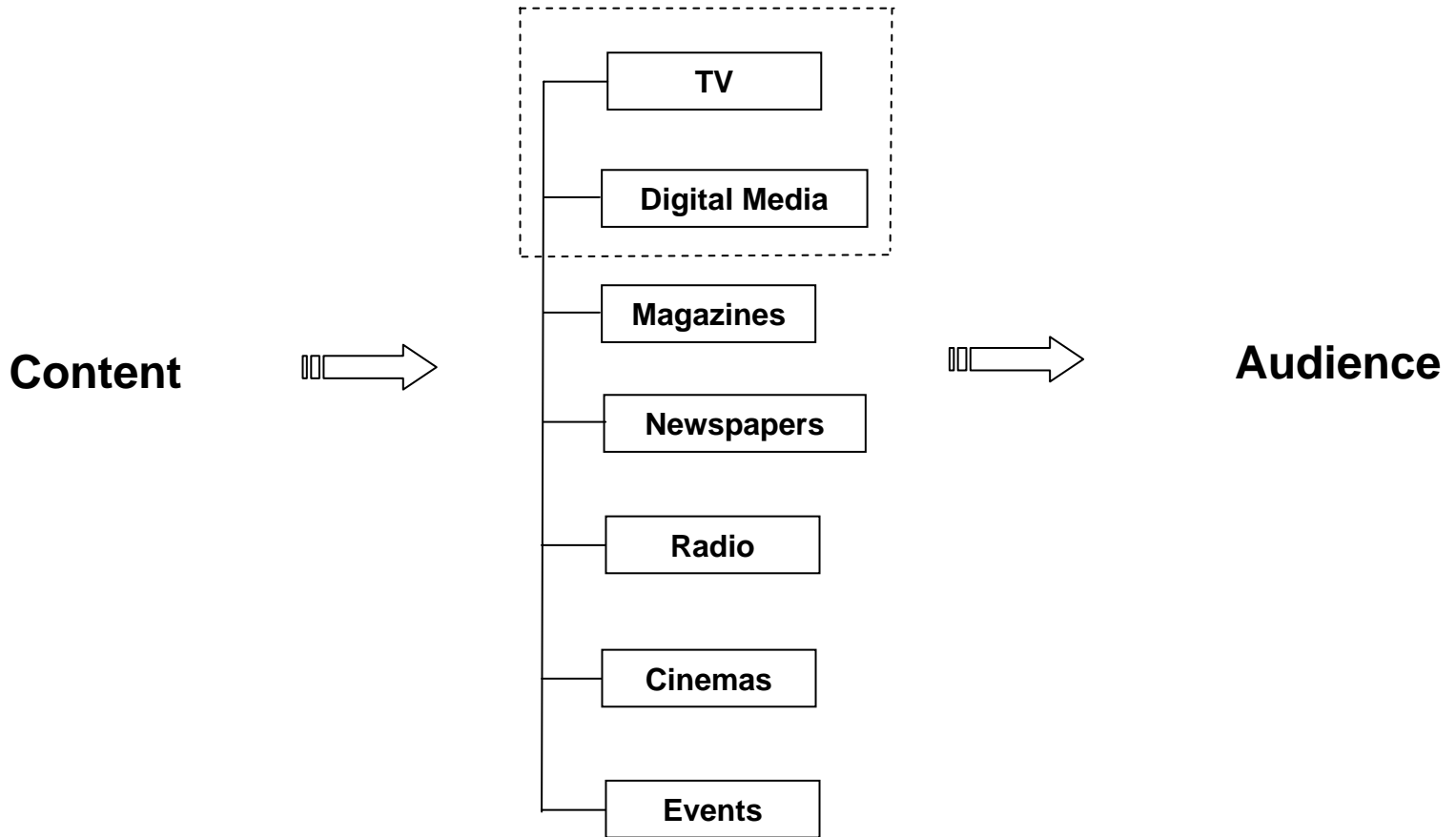
- No.2 in circulation (27% market share)
- Owns 1 in every 4 magazines read by Australians



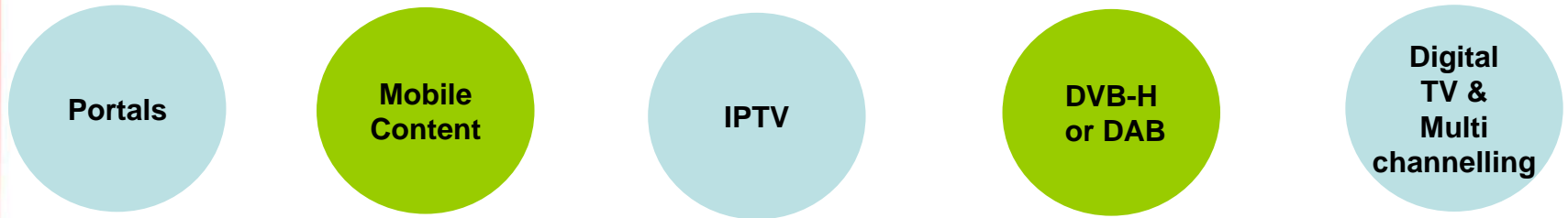
The broadband revolution is affecting the traditional media model



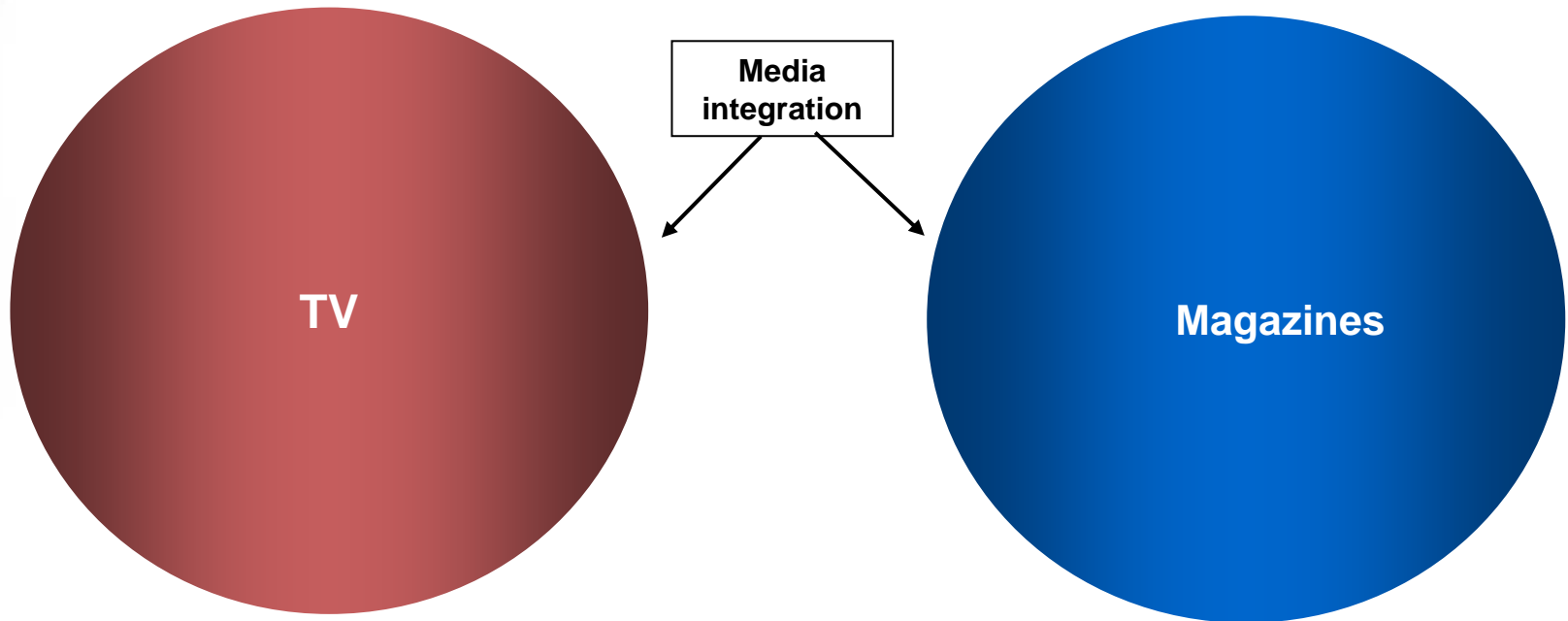
Embrace being a truly integrated media company



Must ensure content remains king....



Digital media delivery platforms will all rely in some respect on broadband penetration and bandwidth



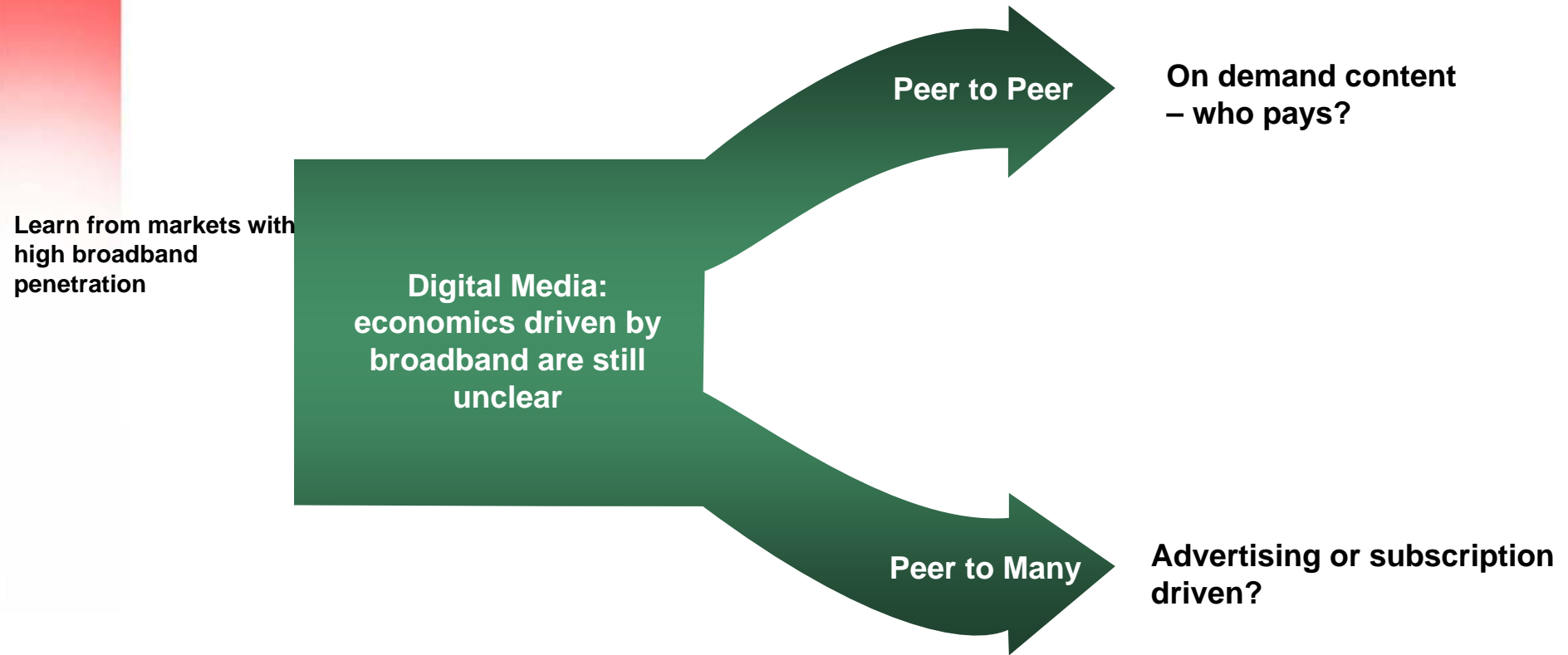
.... and recognise we are now in the content management business

- Understand the business models
- Ensure access to scale distribution platforms
- Core competency must be content acquisition and creation
- Know where we sit in the value chain

Evolve from depending on traditional media before it is cannabilized by the broadband revolution



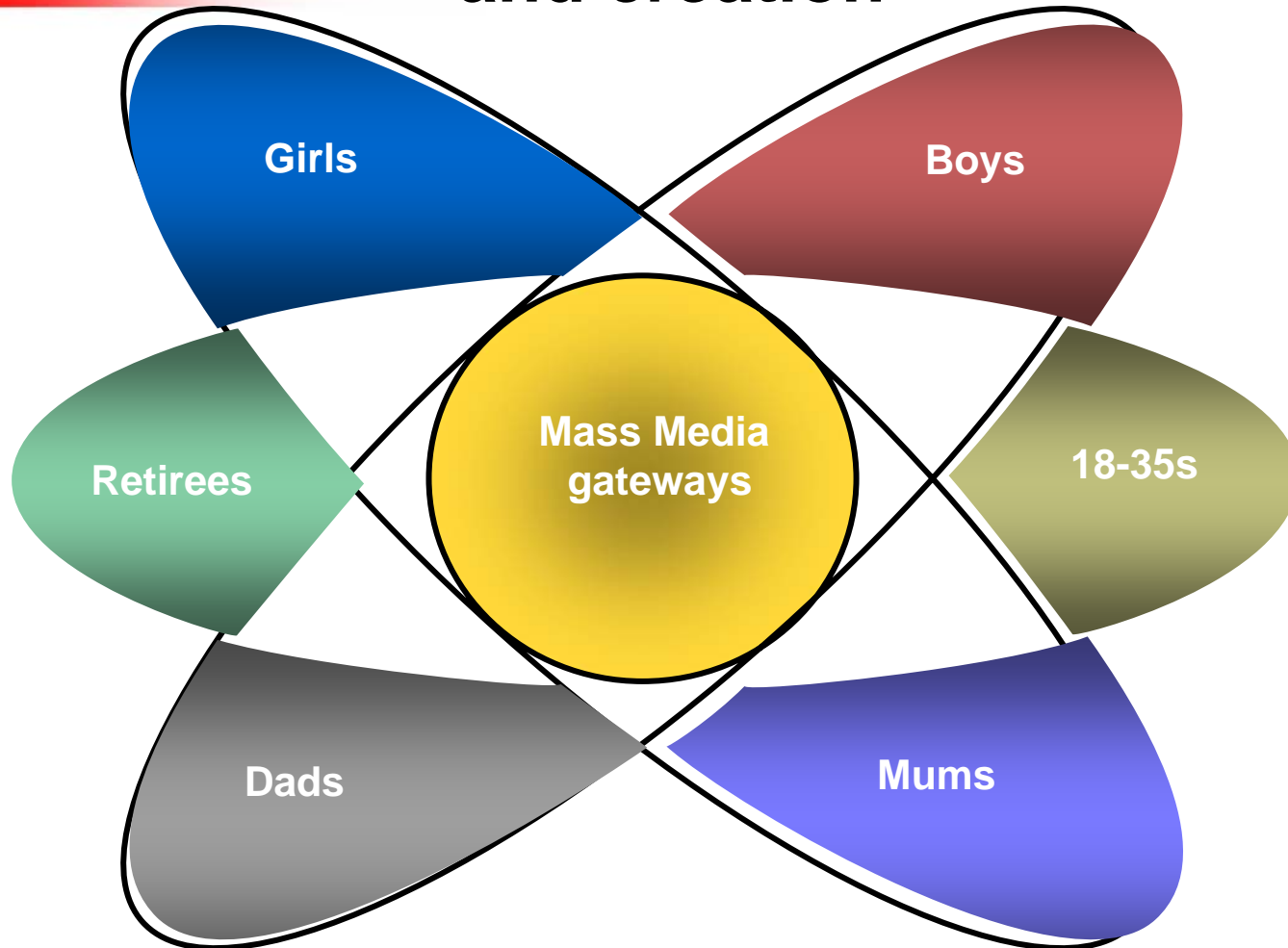
Understand the business models



Audience behaviours don't change overnight – requires education and stimulation by media operators and communication carriers



Core competency must be content acquisition and creation



Content in a broadband environment is likely to be more niche so segmentation and brand management become fundamental



Ensure access to scale distribution platforms

Only room for a few scale players in Australia....

Portals

Mobile
Content

IPTV

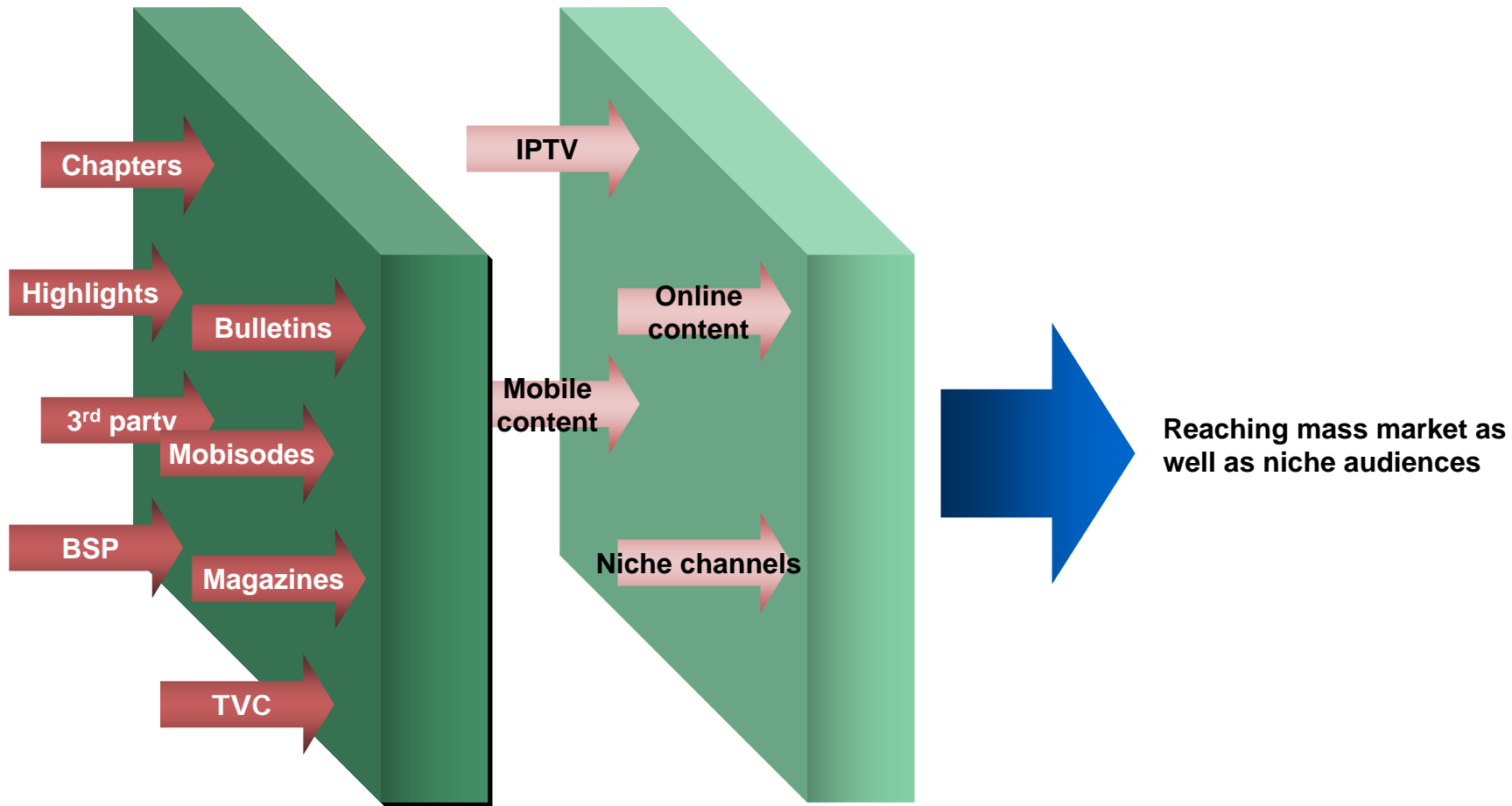
DVB-H
or DAB

Digital
TV &
Multi
channelling

..so content may need to be exportable – but remain niche



Content management: Turning snacks into meals



Our view of content is evolving? The platform is becoming irrelevant

Text



Girlfriend.com.au
make us your homepage!

New Idea

Televoting



Information

Better Homes and gardens

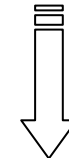


beyond TOMORROW

Video



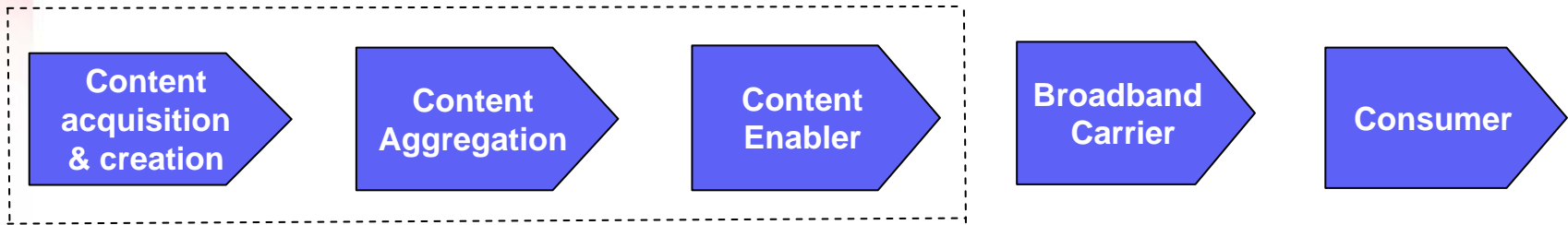
Ringtones, Wallpapers, Icons, Games?



Gaming? Shopping? Applications?
Security? e-health? e-learning?



Content enablement: knowing where we sit in the value chain



Content management requires more than picking the right content.

It's also about packaging....

.... and getting closer to the consumer.

