

'OUTSIDE THE BOX: TELEVISION 2018' PROJECT BACKGROUND, RESEARCH QUESTIONS, AND CRITICAL UNCERTAINTIES

BEN GOLDSMITH

AFTRS and University of Queensland

In 2004 when this project was first planned, it had already been apparent for some time that what we knew as 'television' was undergoing substantial change. It was also apparent that a period of further and even greater transformation lay ahead. In Australia, as around the world, individual producers, businesses and regulators were struggling to come to terms with the enormity of the changes wrought by digitisation, and to comprehend the political, social, economic, technological and environmental influences that would shape television over coming years. Old certainties were being undermined, or had collapsed completely. Although it still survives as a powerful economic and social force, the broadcast model of television in Australia that had been evolving since the mid-1950s as a mix of commercial and public service free-to-air stations and networks with a monopoly over the transmission of audio-visual information and entertainment had been broken by the introduction of cable and satellite subscription television from the mid-1990s. While the prospect of television quality video content on the Internet remained some distance in the future in 2004, the potential of this new platform to explode the new television settlement was becoming clearer. And while the date of the switchover from analog to digital broadcasting was then still some time away, and far from fixed, the inevitability of this transition foreshadowed further, thoroughgoing change to business and investment models, to production practices and forms of content, to policy settings and rationales for regulation, to the hardware of television and to consumer choice and audience behaviour. In the decade or so before 2004, and in the years since then, communications and entertainment platforms and technologies have proliferated, some competing with television, and some providing new outlets for the delivery and consumption of content that previously could only have been viewed on the big box in the corner of the living room. Television has well and truly 'escaped the confines of the domestic space';¹ and thinking about television and its future now means thinking 'outside the box' in the living room, hence the title we adopted for this project.

The experience and prospect of transformation of television at all levels — training, production, distribution, regulation, funding, reception and engagement — requires the consideration of options and planning for the future. But predicting the future is a difficult and even dangerous pastime, particularly when billions of dollars and thousands of jobs are riding on the outcome. To complicate things further, the fragmented and highly competitive television sector means that those parties seeking to anticipate and apprehend the influences on television's future are often hampered by being able to work from a position of only partial insight. And while some government agencies and industry bodies have undertaken research exploring aspects of their specific interest, prior to this project, no comprehensive research capturing the full sweep of the audiovisual future had been undertaken. To achieve a view of the big picture would require collaboration and sharing of knowledge and ideas.

Influenced by a UK study conducted by Bournemouth Media School in conjunction with the Independent Television Commission and the British Screen Advisory Council in 2001–02,² and also

¹ Graeme Turner and Jinna Tay, 'Introduction' *Television Studies After TV: Understanding Television in the Post-Broadcast Era*, London and New York: Routledge, 2009, p. 1.

² Robin Foster, Christine Daymon, and Sam Tewungwa, *Future Reflections: Four Scenarios for Television in 2012. A Scenario Analysis Study of the Television Industry*, Bournemouth University, November 2002.

by a foresighting project conducted by the former Australian Communications Authority in 2004,³ our project's initiator and driving force, Andy Lloyd James, former head of national networks at the ABC and adjunct professor at UTS, determined to apply some of the futures thinking and methods outlined in these projects to Australian television. Andy's intention was to facilitate a set of strategic conversations around the future of television, not in order to predict the future, but rather to explore potential influences on future developments in order to assist all of those involved in producing, broadcasting, and using television, and in a different way those who watch and study television, to discuss and plan for the inevitable changes ahead. Working with Professor Ross Gibson and Annmarie Chandler, Director of the Emerging Field in New Media and Digital Culture at UTS, Andy successfully secured seed funding for a pilot study through a UTS Partnership Grant that was supported with specific in-kind commitments from the NSW Premier's Department, the Australian Broadcasting Authority, and the Australian Interactive Media Industry Association. 28 participants including representatives of relevant state and federal departments and agencies, professional organisations, producers of film, television and new media, broadcasters, advertising agencies, telecommunications providers, and investment houses were interviewed, and a forum was held at which influences on the future of television in Australia were canvassed. The pilot study formed the basis of an application to the Australian Research Council's Linkage scheme in 2006. The project was to be administered by UTS, with industry partners the Australian Film, Television and Radio School, Foxtel, and the Australian Communications and Media Authority. This application was successful, and the project began in 2007. Two years on, we are now able to report on the processes and outcomes of this project.

The profiles of the industry partners are evidence of the level of interest in the research questions, and their partnership, together with the calibre of participants gathered by the research team, demonstrates the importance placed on the collaborative aspects of the project. The Australian Film, Television and Radio School under its former Director Malcolm Long recognised the need to understand the impacts of industrial and social change and anticipate where possible the influences on television's future in order to inform its training programs and to ensure that it continues to produce graduates who are well-equipped to cope with and lead industry change. Foxtel, for its part, has long been an innovator in television production and delivery, and has a consistent need for quality research into future trends, opportunities and threats to its operating environment. And the Australian Communications and Media Authority has a similar need for timely, comprehensive and forward-looking research to inform its regulatory responsibilities.

From inception the project has drawn on interviews and forums with industry practitioners and others with an interest in the future of television along with analysis of industry trends and research reports in Australia and worldwide to hone its research focus. The core research question — 'What will Australian television and society look like in 2018?' — was devised at an early stage. The invitation to think ten years ahead was deliberately intended to take participants beyond their comfort zones, beyond the immediate present and short-term future that are often the limits of strategic planning. The ten-year time frame provided an opportunity for radical but also contained thinking about the future. It is difficult to be visionary about the future when change is happening all the time, at what seem to be accelerating rates, across media technologies, media industries, institutions and forms of content, and at a time when almost all aspects of television are in flux. The range of options that even a cursory examination of the present and immediate future produces can seem paralysing.

For this reason, the research team chose to utilise scenario planning methods to explore the core research question. As Hugh will discuss in more detail in a moment, scenario planning is a set of methods designed to assist participants to prepare for the future by facilitating informed strategic

³ Australian Communications Authority, *Vision 20/20: Future Scenarios for the Communications Industry: Implications for Regulation*, Final Report, 2005.

decision-making. The scenarios that are produced through the process of scenario planning are not predictions. No one can definitively map the future. Rather, they are attempts to construct coherent stories about possible futures, to enable participants to consider the environments within which they are, and will soon have to operate. The stories help to anticipate what the future may hold, and to imagine how we can prepare ourselves for it. Scenario planning encourages the taking of an active role in shaping the future.

Scenarios provide a range of perspectives on what might happen, rather like a set of maps describing different aspects of a landscape. They help us to navigate or explore the future. Building scenarios requires constant innovation and creativity.

Scenario planning is a robust process, and often a lengthy one requiring multiple and often repeated steps. It is an iterative process. It is methodical, not mechanical, and intuition is an important component alongside rational analysis.

Through a series of interviews, forums, and story-generating and -telling exercises, we explored the social, technological, economic, environmental and political contexts for, implications of, and influences on, changing television. We asked participants what had surprised them in the last ten years. Several talked about the power of the idea of ‘free’, as in free access to content, and others expressed surprise at the slowness of change particularly in the roll-out of new technologies and the business models of traditional media providers. Through the interviews, forums and exercises, we identified six core ‘cluster categories’ or sets of drivers of change: People, Technology, Funding, Governance, Environment, and Content as Audiovisual Experience. Philip will talk about these categories and their implications in more detail in a moment. In essence these categories represent those issues of most concern. The interviews, discussion, storytelling and analysis, enabled us to determine which aspects of these issues were relatively certain, and which were most uncertain and mattered most.

Through this iterative process we identified two critical uncertainties which then became the two axes of the Matrix, which is our principal resource and tool.

The first axis is a continuum from Controlled to Uncontrolled *content*. This refers to the extent to which information and cultural content (programs, news services, ‘live’ broadcasts of sport etc.) created by individuals, companies or organisations and distributed or distributable via ‘television’ is subject to, or free from, legislation, regulation, property rights, financial requirements or technological limitations.

The second axis is a continuum from Open to Closed *access*. This refers to the potential and actual access of creators and users to the means to create, share, consume and store digitised content. This is not to suggest that any system could be completely open or restricted (except perhaps in totalitarian contexts) but to alert us to extreme alternatives.

I’ll hand over to Hugh now to explain in more detail the application of scenario planning methods in the project, before Philip outlines the scenarios we developed.