Newly Mediated Media: Understanding the Changing Internet Landscape of the Media Industries

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The Internet is an elastic phenomenon that in its 30-year history has engulfed and absorbed greater and greater aspects of our cultural activity. It has come to represent an enormous and accessible library, an elaborate system for the trading of goods and services, and a behemoth of social networking and presentation of the self along with a host of other characterizations. Over its last 15 years, the Internet in its subsystem as the World Wide Web has progressively also become a media form – albeit a media form that is not as definable as its predecessors. This chapter looks more closely at how the Internet as media form has led to quite profound transformations of what could be characterized as traditional media in terms of economic models, forms of production, patterns of exhibition, and definitions of its audiences. At this moment, the media industries in a very real sense are being absorbed and ingested into a more complex system of exchange, agency, empowerment, and political economy that has begun to change fundamental media industries' business models. This absorption is not to say that existing media forms are disappearing; rather the traditional forms of television, film, newspapers, magazines and radio are presenting different and extended patterns of distribution, decidedly new formations and deadlines for the production of material, clearly shifted techniques for generating income, and new formations and even conceptualizations of audiences. The complexities of these newly *layered* media forms – something Henry Jenkins describes as a convergence *culture* that indicates our need to explore the cutting edge of a participatory media culture (Jenkins, 2006) – not only have repercussions for the media industries themselves but herald a wider cultural transformation of the role media play in contemporary culture.

   The idea that the web is engulfing various media is certainly not new and has been explored through various strands of new media and Internet studies. Convergence, for instance, perhaps best expresses the phenomenon and futurist writers such as Gilder (1994), Pavlik (1996), and Negroponte (1995) first addressed these possibilities of how the computer interface would eventually usurp the other past screens of the household. Various authors have explored the way that media

have integrated web-based forms in their content and the understanding of the web as a media form has also been advanced in key texts in the last decade (see Burnett & Marshall, 2003; Marshall, 2004). Lehman-Wilzig and Cohen-Avigdor attempted to understand the Internet's usurpation of older media in terms of an elaborate media lifecycle that indicated that the Internet was a multimedium that absorbed and transformed existing media (Lehman-Wilzig & Cohen-Avigdor, 2004). Fidler coined the term "mediamorphosis" to help describe how new media shifted the media environment into new but genetically related entities (Fidler, 1997).

Convergence between offline media and online media has been studied in often-distinct intellectual traditions depending on the media form or genre. For instance, online news which now naturally embodies print news and television news has been studied in two distinct ways. From the late 1990s, newspapers in particular were looked at in terms of how closely they "mirrored" their print versions which followed a longer debate about whether newspapers were in decline. (Allen, 2006) During the 2000s, much of the focus of online news research has been concerned with the newsblog (Singer, 2006, pp. 23–32), particularly after the terrorist attacks of September 11, 2001 (see Allen, 2002, pp. 119–40) and a wider engagement with what has been described as "citizen journalism."

Television has also been a source for some scrutiny of its transformation into a hybridized broadcast/Internet-based entity. Quite extensive writing has explored the way that both fan culture and reality television have grown partly because of new relationships to audiences and activity produced by the Internet (see for example Marshall, 2004; Jenkins, 2006; Andrejevic, 2009). Also, recent work on how public television broadcasters are dealing with their public mission in an area of multiple access points for content has been particularly fruitful in investigating the convergence of broadcast and online culture (Deuze, 2007).

In contrast to this work on news and television, film as a medium has been investigated quite differently when linked with the concept of convergence: a series of analyses has explored the implications of the digital in transforming film into the prevalent form of the DVD as well as a new digital aesthetic (Darley, 2000; Harries, 2000) and very little academic work has been done about the movement of content or exhibition – even in terms of piracy and illegal downloading – concerns onto the web. Perhaps one of the more influential approaches has been forwarded by Bolter and Grusin who identify how new media "remediates" past media and further explain that digital cinema with its special effects and spectacle was producing something that connected cinema to its origins – a cinema of attractions (Bolter & Grusin, 2000, pp. 155–58).

It is also worth detailing the intellectual and academic institutional movement grouped around creative industries which has also articulated a sense of the interconnection of creativity itself with the movement and transformation of information into knowledge and design, and thus has provided another area where media convergence has been investigated (see for example Hartley, 2005). In these analyses, creative industries have formed a seamless intersection of work and knowledge-creation that was very much wedded to the way that information moved

through the Internet, with former boundaries between creative practices in their digital transformation now much more unified (Deuze, 2007). In Richard Florida's characterizations these new economies of information development and design were instrumental in the development of megacities that serviced the new interlocking creative class (Florida, 2003, 2008).

Despite all of this past work on how media have been newly mediated by the Internet, it is often difficult to get a clear map of the labyrinthine intersections and connections that link traditional media and online mediations. Like hyperlinks themselves, traditional media are housed in elaborate layered architectures and industrial models that often try to ensure a positive traffic flow between their original forms and their online forms. To explore the new layered look of the media and to generate a basic map of the media industries in terms of their online presence and the wider industrial intentions, I have divided the rest of the chapter into an analysis along five axes:

1 Promotion
2 Replication
3 Income
4 Alliances
5 Replacement

These axes play slightly different roles with each traditional media and what follows is a reading of their various forms of reactions to the new realities of the media industry. It is also important to emphasize in any analysis of the Internet and its interplay with media and culture that its impact is tempered by the technological infrastructure. In other words, the Internet's role in any nation or region is determined by the accessibility of connected computers and the speed of the connection. Thus, if broadband connection is relatively inaccessible in a given country and limited and inaccessible dial-up access to the Internet is still the dominant manner of connection, there will be a disconnect from the transnational flows of this new media industry. The implications of that disconnection will vary quite dramatically, with clear examples in a country like India where certain wealthier class fractions and certain regions are participating in this new layered media environment while much of the rest of the culture is playing in a different media mix. What is often called the digital divide (that is as much within nations as between nations) produces quite different media ecologies and even micro-media environments. Thus, the analyses that follow will have gradations of reality depending on the impact of the Internet and the web in different cultures.

Promotion

In 1998, I published an article that explored the way that the media represented themselves on the Internet (Marshall, 1998). It was clear then that there was

a great deal of activity on the Internet by the various media, but this didn't necessarily imply a full embrace of the Internet's interactive logos. What was evident in 1998 was that promotion was front and centre in most traditional media's web presence. In other words, the objective of the websites was to pull the user back into the audience of the television network, the newspaper, or the radio station, and the website was an elaborate and quite sophisticated form of advertising. This promotional aesthetic and objective was perhaps most strongly evident with television and film, and perhaps most weakly represented by print media. Web presence for traditional media was motivated in the 1990s by the same rationale that has kept corporations advertising: they are not sure whether the promotion works, but they ultimately fear that things will be worse for their sales if they do not promote. Indeed, the massive proliferation of businesses of all kinds having a website was and continues to be one of promotion and presence in the vast majority of cases. It remains the exception that a particular business incorporates the web's possibilities fully into its structure and central business plan.

Ten years later the idea of promotion remains the very core in the websites of most media corporations. What has changed is the level of sophistication and resources that are put in place to maintain the promotion. On a basic level, the web's form of promotion is often about corporate brand identity. Thus with newspapers, it is important that no matter what else is contained on the website, there remains the masthead which functions as a brand identity. The reality of newspaper sites is that they no longer draw their content solely from their newspapers and this form of brand promotion presents a useful mirage of coordination that hides the new alliances that are elemental parts of their online coverage. These new alliances which allow an online version of a newspaper to be much more dynamic will be explored in more detail in the alliance axis of this chapter. Suffice it to say that newspapers circulate on the Internet as brands of authoritative news discourse that course through a number of channels so that they appear with regularity when any user searches for news.

The authoritative quality of news brands such as the *New York Times* or Canada's *Globe and Mail* continues to carry weight in an online world that is populated by so many competing blogs and vlogs (video blogs) that make claims to be channels for the discussion of news events. Nonetheless, this diversity of sources actually pushes newspapers to promote quite loudly on the Internet. Two further realities of news coverage make this need to promote all the more central to newspapers. First, at least on the web, there is little that distinguishes CNN, Fox News, the BBC World Service, or even National Public Radio (NPR) from the activities of a newspaper site. Along with the *New York Times* and the *Sydney Morning Herald*, television news sites are populated with the same mélange of text, links to other stories, videos, and slideshows. Indeed all are also populated with blogs from the journalists and opportunities to write in to the site. What has changed is that news sites, whether originating from newspapers or television, are competing to be seen and heard on the Internet in roughly the same register. They are news gatherers collectively speaking that serve as resource centre sites (Bruns, 2005) around the

production and dissemination of news. Secondly, the web has allowed institutions to speak for themselves much more publicly than in the past. Thus, the online newspaper's role of disseminating the information that comes from an institution is sometimes for some users an unnecessary form of mediation. For instance, someone very interested in the particular sport of tennis may go directly to the coverage provided by the Association of Tennis Professionals who have a sophisticated website, rather than trawl through newspaper efforts to cover that sport and report that coverage. Users then are seeking out more direct sources – what used to be press releases in the pre-Internet flow of news – that are sometimes the sources that newspapers have used to cover an individual event in a perfunctory way. Newspapers then in their online presence are not only competing with other news gatherers, they are also competing with institutions and organizations who are the sources of interest for users.

Newspapers online work through their forms of promotion and the collective memory of their value to make themselves distinctive from these other flows of information. In the recent past, newspapers in their hardcopy version have celebrated the individual columnist and the opinions of reporters (Marshall, 2009). The sustained online focus on promoting the individual journalist is a further extension of newspapers into the online world as journalists' opinion blogs become more prominent and visible in the massive blog world. There is a risk in the promotional expansion of the newspaper into news blogs: the newspaper's former claim to authority and objectivity is recast in this movement further into opinion journalism that ultimately resembles the blogosphere itself. Newspapers as entities risk being subsumed into these flows and their distinctive identities derived from their history are similarly susceptible to absorption.

Just as with newspapers, promotion remains the focal point of film and television sites; however film and television websites have achieved levels of sophistication that make it harder to discern where the promotional dimension of their forms of entertainment ends and the actual product begins. This blurring of the line between promotion and cultural form via online worlds has been developing for some time and it is worthwhile reprising some of the influential steps that have helped define the online life of film and television over the last ten years.

One of the seminal moments related to film at least was the unique promotion via the Internet of the independently made but eventually centrally distributed film *The Blair Witch Project* (1999). The basic premise of the horror fictional film was that a camera crew investigating a part of Connecticut haunted by the Blair Witch had disappeared and all that remained was the discovered video footage and cameras. The website intentionally blended the idea of whether the event was fact or fiction and in a viral way attracted an online following about what had actually happened to the young camera crew. The site contained interviews with supposed friends and family as well as other evidence and clues that would help solve the mystery of the camera crew's disappearance. What was unique about the site were two elements: it provided a great deal of material that surrounded

the story that was not in the end in the film, and it predated the release of the film by months in order to create interest in the film. The interest in the film and its mystery helped it successfully launch at the Sundance Film Festival as the new distributors tried to continue the viral interest in the film in the types of promotion developed for it.

Other films experimented with long promotional lead times online. Spielberg's *AI* (2000) produced the now famous murder mystery game – known widely as "the Beast" derived from information on promotional posters a year before the release of the film. Ultimately, the game absorbed a core audience of a million searchers but became an entity unto itself and disconnected from the film. (Jenkins, 2006, pp. 123–5) Nonetheless, it established a potential pattern of expanding the promotion of a film outwards via the Internet prior to its release. *The Matrix* (1999–2002) series also created a continuous form of promotion via the Internet throughout the three-film release. Blockbuster films such as *Dark Knight* (2008) have managed to maintain a high visibility in advance of their release by a selective dissemination of material both through mainstream media, but more significantly through the Internet and advanced information about the film's content. The Internet thus has become the long promotional trailer for the film industry to build hype that becomes the material that fans are drawn to. Significantly, the film industry's love affair with existing cultural icons from other forms (particularly comic books) allows for film to build on existing fan loyalties (one can think here of the *X-Men* films) that serve as clusters attracted to any advanced online publicity for films.

Part of the rationale for both television and film production to present online a kind of promotional ethos is the survivalist relationship to the power of the Internet to transform their highly controlled systems of distribution and exhibition. Although there are many sites supporting the ripping of films and programs shortly after their release (and occasionally before their release), the official corporate websites for film and television have countered these developments with newly created exclusive promotional content that allows the potential audience to become further engaged in the fiction. This technique of deepening the product with additional short productions has been much more successfully attached to television series than films. For example, the intertextual promotional work around *Lost* (2005–) invites the viewer to look for clues online through replays of particular segments. In addition, sneak previews have been available on the official site in advance of the next installment to create a potential viral buzz around possible scenarios. *Lost*'s online producers have added fabricated though very real websites for key fictional corporations that are essential to the plot of the series: the mysterious Hanso corporation as well as the airline company Oceanic, whose plane's crash initiated the series narrative, both have quite functional web spaces that work to deepen the televisual text with extended realities online. Other major American series such as *Heroes* (2006–) and *Prison Break* (2006–) have produced similar elaborate websites. Other series have developed Myspace and Facebook sites for the fictional characters – for example the key characters in the Australian

mockumentary series *Summer Heights High* (2007) all have Myspace sites – which once again are highly complex structures of online promotion of the television series.

One of the central effects of the Internet on film and television then is a new blending of promotion and production. With the elaborate effort to enrich the experience of the story for the more devoted fan of a particular program, it becomes quite unclear where the screenplay and actor's work ends and that of promotion and advertising begins. From Jenkins' perspective, this elaboration of content is "transmedia storytelling" (Jenkins, 2006, p. 21) and the online work is increasingly becoming a part of the experience of a television series that is planned for by the media production companies and network distributors. What is also developing is that television and film programs are being organized for redistribution through online forms specifically for promotion. YouTube thus represents for media production companies a source for the promotion of their product as much as it has been seen as a threat to the control of copyright and distribution. One of the effects of YouTube and other online video sources is that they privileged the dissemination of the "clip" or short segment which serves as a herald for the full film or television program.

Although the form of online promotion by traditional media has morphed since 1998, promotion remains an organizing feature of media websites. Promotion is now quite dramatically integrated into the structure of storytelling itself and definitively connected to fans' investment and loyalty to specific series and productions. For television and film, it remains a truism that these forms of elaboration are means and methods of maintaining the connection to the source of production in order to prevent rampant piracy. For print media, promotion becomes the method to produce an "authenticity" brand of trust among the clutter of online information sources.

Replication

The axis of replication analyzes the degree to which the online source is a copy of the traditional media form. The idea that the online home provides the possibility for complete access to what would normally have passed through other channels is one end of the spectrum; its opposite is the idea that the online home does not reproduce the content of the traditional media (and is often then a source of pure promotion – an indexical sign to the real source).

The degree of replication varies with each media form. Radio stations have now routinely made their websites another access point to their signals through online live streaming. The computer itself becomes a receiver. For the business of radio, the different delivery system is simply a way to expand the "signal." New office environments are filled with networked computers that allow workers to have their favorite radio stations streamed through their personal computers: the small radios and stereos have generally disappeared in many offices. A further element in the reason for radio's wholesale adoption of and replication via the web is its

relative technological ease. Audio streams live at a much faster rate, which makes a radio signal more available than video streams. The Canadian CBC has 31 feeds of its programs to cater to stations across the country. Australia's ABC is not as generous in its reconstruction and streams seven signals of its flagship networks.

Radio's replication via the Internet is not as straightforward as just another form of signal carriage. Most radio stations' websites are catering for some major changes in distribution of audio programming. Publicly owned radio stations have generally made it part of their mission to replicate further their programs by making them available through "podcasts" or in MP3 format for downloading. Thus CBC Radio through its various networks or Australia's Radio National will ensure that most of their special programs are "saved" online for this expanded method of both distribution and audience timeshifting. The BBC maintains a seven-day archive of its programs. NPR in the United States has 622 different podcasts to choose at the time of this survey that are available in conjunction with the streams of their individual local stations. The visible embrace of podcasts for radio serves to change radio culture somewhat into a culture of valued programs and information sources. It is also recognized that podcasts allow users to both time- and place-shift into formats that are being accessed via their iPods, phones, and car MP3.

To characterize radio's form of replication is to acknowledge that websites of traditional media are at times hyperversions of their broadcast selves. For both commercial and publicly owned radio, websites also become the home for contests, blogs of on-air personalities, and methods for sending emails to specific programs and hosts. Their replication is a form of structured interactivity that has in many ways augmented the way radio had used the phone call as its feedback loop to its audience for the last half of the twentieth century. Layered onto that structure of connection to an audience is how radio stations' websites provide other kinds of information – news reports, weather, sports – that are presented in a text way that goes beyond the structured program flow of this same information on air.

Both television and radio broadcasting share some elements that make their websites hyperversions that go beyond replication. Consistently, radio and television provide extensive guides to their programs, the kind of material that would be sent out to newspaper media listings and TV guides without the excising of at least some of the promotional literature for each program. With radio, the website is relatively comfortable with the guide providing clear links to downloading program content. Television's means of replication is much more circumspect as it attempts to control its assets and intellectual property to ensure that there is some generation of income via the website and the original television broadcast. Thus, the major American television networks ensure that there is a secondary release of major series online one day after the release on air. The American network ABC for example has a countdown clock to the next on-air screening of the series *Lost* and in another portion of the website you can watch the past episodes and see a bulletin that the show will be available the day after its screening. Interestingly, old content is more freely available via websites. Thus, it is very possible on NBC to screen old episodes of the 1970s series *Battlestar Galactica*,

but there is much more controlled distribution of material related to the current *Heroes* series. Nonetheless, the website replicates programming with an online difference that viewing episodes online is designed to ensure that the audience member "catches up" to the current installment in any series. There are different and distinctive forms of online distribution of American programs that have an international profile; the Seven network distributes *Lost* in Australia, but, unlike its American counterpart, it has no day-after online screenings. Replication on the Australian site is filled with short preview clips and an elaborate series of short clips from each episode that identify some key clues for understanding the convoluted *Lost* plot. There is no question that the international and relatively borderless structure of online culture has affected the structure of domestic and national television markets and their patterns of distribution. The gap in the release of series between the US and Australia has narrowed, with the *Lost* series one week behind its American premieres. The speed of this transfer also underlines the massive online economy of piracy of individual episodes. Likewise, episodes are regularly divided up and distributed via YouTube – at least before the corporate copyright lawyers attempt to shut down these forms of sharing.

In contrast to television, newspapers have had a much longer history of online replication. The relative ease with which text and image could be reproduced via the web meant that the challenge and the threat of online publishing of news have been ever-present since the mid-1990s for newspapers. Different models have been advanced over the years. What has developed is a general model that the online "paper" does indeed replicate the hardcopy version: major stories are aligned to a newspaper's homepage but they are signaled much more clearly through the use of an image and caption. Opening paragraphs are visible for these stories, but readers online have to click on a link to go further into the story. The key difference in the production of newspapers online is that the content is designed to change regularly and rapidly. Stories then are subject to updates in a manner that is impossible for the printed versions of newspapers, and major newspapers work to have the sense of continuing developing news. And, as discussed further in a subsequent section, it is also worth indicating that newspapers are not limited to their own content production: they work to have a number of marquee videos to supplement their content. Some newspapers such as the *Wall Street Journal* ensure that only subscribers can access the more official version. This relationship to the authentic version is another variation of online publication. Through different types of software reading devices online, papers like the *New York Times* can be downloaded in page-perfect versions. But what is more interesting and probably of greater long-term value for its online production is the development of a service called *My Times* which allows you to organize the content of the paper to suit your personal interests. This trend in newspaper production where information is reconstructed in personalized web frameworks matches the movement and development of online distribution of news and intersects with pre-existing services on the web such as MyYahoo! and the more recent Google News. Equally interesting is how the content of the newspaper becomes very elastic online. The

Wall Street Journal ensures that each article ends with the columnist's email address. It is also a recognized need by newspapers that their journalists are producing associated blogs for the extensions of their work. Indeed, as with radio, newspaper websites via blogs can be extended versions of published interviews. As well, the *Wall Street Journal* works to establish that it is a database of material for further in-depth searches. Its *My Online Journal* allows the subscriber to track specific companies (up to 10) and obtain wider reach across 28 industry sectors, along with specific stock information. What becomes evident in business-oriented newspapers is that they are competing to become the principal portal for players in the business world. A plenitude of podcasts and business videos are part of the parsing of information for retrieval for subscribers.

In general, the media industries are replicating themselves online, but realizing in that replication that they have to structure, compartmentalize, and produce multitudinous possibilities of flow and user patterns. The replication then becomes a way in which a form of individualization of use is at least made credibly real as the various industries try to ensure their visibility via the web.

Income

At the very hub of change and transformation of media industries is the way in which they sustain themselves and, in at least their capitalist incarnations, how they generate forms of profit. One of the features of mid- to late-twentieth century media corporations was their incredibly stable and profitable business models which allowed the newspaper baron Lord Beaverbrook to label ownership of a television station as a "licence to print money." The stability of these business and economic models has been explored in many works that looked at the political economy of media. To summarize it here, the media industries have worked with three basic models. The first and most prevalent is the advertising-supported model, the second is a subscription-based model, and the third is a government-supported model. It should be added that there are and have been hybrids that blended all three of these models. What you find in most media forms is some blending of at least two of the business models. What provided the income stability was the conceptualization of the audience and its size. The measurement techniques of the audience provided a generally agreed-upon acknowledgement of the power and influence of the various media and this recognition led the media collectively to be seen as part of the key defining elements of the modern public sphere.

As the audiences and subscribers have been gradually bled away from the traditional media, the models of income support, which have been dependent on both the stable conceptualization of the audience and the related acceptance of the media's power, have been challenged. It could be said in the 1970s for instance that television in a given country somehow embodied the public sphere in its programs and in its relationship to political and cultural agendas. Nearing the end of the first decade of the twenty-first century, it could be said that television does

not occupy such a central role and the claim to synonymity between the public sphere and television is unsustainable. In many countries, a milestone has now been reached: the number of hours each week devoted to the Internet has now surpassed household TV viewing hours.

As these media entities have become diffused, they have moved laterally – that is, they have become multimedia entities. As detailed above, different media have produced strong web-based presences. In the 1990s, this model was characterized by media websites that were designed to bring viewers back to the anchoring original entity. Television stations would provide elaborate program guides; newspapers would indicate the pre-eminence of the hardcopy. The technique was to promote and to maintain the brand. Online homes were therefore not the site or source for the generation of much income. Indeed, like many dot.com startups in the 1990s, media entities recognized that the income models of the Internet were not real but more projections of the likely development of income in the future.

If we look more closely at the development of the online incarnations of media forms, the kinds of income generated resemble those of their broadcast origins. Advertising has become the lingua franca of the Internet. With television websites, these "commercials" tend to focus overly on advertising their own products. What is interesting is the multimedia mix of types of advertising, something that would be harder to realize in the broadcast world. Thus online television sites are filled with animated gifs, text- and image-based advertising, sound-bites, and very traditional commercials. Online television – when it does permit the streaming of programs – usually tops and tails the particular segment with the marquee sponsor. The marquee sponsor highlights television's efforts to replicate its broadcast income model. For example, the program *Lost* via the network ABC may have a relationship with Nissan where their advertisements in a very controlling way begin any particular streaming with a 30-second spot. This model returns television to something resembling single-program sponsorship that was instrumental in developing early American radio and 1950s television. However, with the webpage clutter that envelopes any television network website, the exclusivity of this kind of sponsorship is continually challenged and its value to the advertiser is thus limited.

One of the clear advantages of the Internet as a source of income generation is its capacity to produce this multimedia environment. Newspapers thus are no longer limited to text and display advertisements (although these still predominate its presentational model). Animation and short videos become part of the mix of how newspapers sell themselves and generate online income. This difference is reflected in both content generation and advertising to create the effect that newspapers online are designed to be an information portal. For instance, the *Boston Globe* is part of an online entity entitled Boston.com that highlights the *Globe*'s (and one of the local television station's) capacity to serve as the source for all things related to Boston.

The model of subscription has been harder to generate in the mediation of media online. Certainly through various techniques the brands of different media are seen to offer some sort of premium in quality. For instance, newspapers provide

a premium service to those who subscribe both online and in their paper form. The *Wall Street Journal* also has recognized that it has constructed its news for a business readership and it has constructed tiered relationships to content. Trade presses like *Advertising Age*, whose core audience in the advertising industry is composed of a younger demographic and may already be very web-oriented, have made it a seamless subscription that connects printed versions to online versions. Indeed, the strength of *Advertising Age* is its ready building of related brands and sources from their online homes. Because of their video format, the online version of reviews of new commercials allows the easy perusal of the new video content, something quite unachievable through the printed version. And thus it could be said that in some instances, the online subscription may be critical to the income of particular media sources that are more closely related to the entertainment industry itself.

In general, income generation continues to be the bête-noire of the media industry and its online incarnations. With the movement of the share of advertising revenue increasingly into online structures, there is no question that the revenue streams of traditional media are expanding as well. The danger of this slower expansion is that different models of delivery of content could emerge that would take away the advantages now held by the recognized brands of media.

Alliances

The web has produced many media marriages as older entities try to intersect with some of the newer techniques of how audiences access their news, information, and entertainment. Similarly, web-based companies sometimes see the value in connecting with and collaborating with established media names in order to shore up their capacity to present reputable content. These arrangements and marriages of convenience operate at different levels of commitment and the best way to refer to them is as alliances.

Some alliances are incredibly powerful and have had remarkable longevity where brands become associated. For instance, MSN (Microsoft Network) and NBC established a news network, MSNBC, which has taken on a life of its own. Originally, the alliance served to provide a news web presence to MSN at a time when its parent Microsoft was engaging in the famed browser wars with Netscape. MSNBC also provided an instant structure for a website for NBC at a time when its parent company General Electric was launching into the production of an all-news cable channel. Ownership of MSNBC originally was a shared 50-50 for the cable channel but it has since become primarily owned by its parent NBC Universal. The online version MSNBC continues to be equally owned. Moreover, the online msnbc.com, in its challenge of the online versions of other newsgathering entities established content deals with the *New York Times* among other prominent sources. It is also worthy of note that a similar arrangement was struck between the most powerful commercial network in Australia, Channel 9, and MSN

in 1997, where the new entity was entitled ninemsn and became one of the largest Australian web portals (because it is the default homepage of the Microsoft packaged computers). In 2006, in a very similar fashion, Yahoo! Australian Seven Network launched Yahoo7 which was a 50-50 venture between Yahoo! and the television broadcaster.

Other alliances are more subtle, yet perhaps more comprehensive in the movement of video from television to the Internet. In March 2007, a distribution deal by both NBC Universal and News Corporation was developed for the movement/distribution of high-quality video through key Internet-related sites such as AOL, MySpace, MSN, and Yahoo! (News Corporation, 2007). As the Internet becomes a more likely destination for the viewing of video content, the larger media entities are working out arrangements for breaking down their content for its reassembling in shorter formats via these websites. In conjunction with this movement of content is a recognition that advertising income must also be generated, and arrangements with major sponsors have accompanied the video distribution.

Alliances are more subtly constructed with the news services of major newspapers and the homepages constructed by Google or MSN. News stories from particular newspapers are "pushed" at users in a more or less regular pattern. The news stories are also country-specific – in other words, those users located in the US would receive feeds from American news services that would cater specifically to that national audience. In the directory and category structure of Yahoo!, wire services have often been privileged along with key newspapers. What appear to be relatively random choices of stories are clearly agreements between the Internet portal and the news provider. This relationship once again underlines an alliance between content provision and what is equivalent to a channel on the Internet.

Finally, alliances sometimes are user driven which can shift the relative power that any Internet entity might appear to have. The rapid expansion of RSS feeds from Internet sources to the homepages of users has allowed users to blend their favorite blog sites and interests with news and sports stories that are regularly surveyed and posted as headlines to the client/user. Thus the alliance is not so much to the entire media entity, but rather to a selection of content with a particular media content-provider. There may be a mélange of web-based journals and traditional online versions of newspaper stories that are further blended with regular feeds from new YouTube videos and weather services to comprise a complete homepage that is at least hosted by services such as Google or MSN.

Replacement

In the early days of the Internet, it was a regular and repetitive feature of newspapers and magazines to report on the potential moral panics, dangers, and risks of using the web. In contrast, traditional media despite these sensational reports

presented themselves as safe, recognizable, and ultimately reliable. What has changed over the web's first 15 years is that there is less of an adversarial relationship between traditional media and the web and more of an acknowledgement of integration. The greatest corporate efforts to challenge the pre-eminence of print media occurred in the first five years with the launch of Internet magazines such as the Microsoft-initiated *Slate* (1996) and the independent *Salon* (1995). Ultimately these online-only magazines never threatened the traditional magazines directly and certainly didn't lead to massive shifts in media business models as their own experiments with online subscription either faltered (with *Salon*) or failed completely (in the case of *Slate*). Both *Slate*, which is now owned by the *Washington Post* group, and *Salon* continue to exist and depend primarily on advertising for their revenues; ultimately however, they are rivaled by the online presences of magazines and other television-based media sources.

The online magazine development and their quiet denouement provide an example of how difficult it has been for online sources of media content to thrive on the Internet and to serve as replacements of traditional media. It may appear at first glance that YouTube has successfully developed a model that is replacing the way in which video is viewed and distributed. After all, the service has millions of viewers, it has constructed the possibility of having your own "channel" for distribution of content, and it has successfully captured the international imagination of a generation of online users. For all its successes there is something incomplete in the way that YouTube operates. YouTube is much more about the distribution of existing content rather than "live" content and the liveness of television still provides a sense of its pre-eminence. YouTube often reconstructs the content of popular culture for further distribution. Through mash-ups and different music renditions, through distribution of shorter segments of television programs, and then through comments by different viewers, Youtube has constructed an elaborate series of communities connected to different aspects of video culture – but it is not live. Indeed, one of the key failures of the Web has been many of its live online events over the last decade. Although there have been some successes in "netcasts" in recent years particularly in relationship to concerts and benefit events, it would be fair to conclude that streaming of live programs has had limited appeal when events are designed for massive audiences.

Where there has been emerging success in online video is in much more niche markets. There is no question that the pornography industry has migrated dramatically to an online distribution of its content with continued and remarkable success. Sports coverage is also beginning to evolve into a model where the most devoted can gain access to greater online video content. For example, men's professional tennis has produced through the UK-based Tennis Properties Limited and Perform Media Services a series of live-streamed and downloadable matches related to its major international tournament series known as Masters. Devoted fans can choose to subscribe for an entire year, individual tournaments, or a particular day's coverage. YouTube and Facebook are used as sites to promote the fully subscribed online channel, but they are also places for fans to

comment and discuss their own interpretations of tennis matches. What is developing through these extensions of live video is that the web is providing means and methods for the ready expansion of interpreting, editing, and transforming content that reconnects the video to the new and now central-to-the-experience-of-the-web exigencies of social networks.

As discussed above, television has now entered into thinking of its various network websites as locations for the distribution of video content. Perhaps what is most interesting in this development is that the public broadcasters are moving at a faster pace than many of the commercial networks. Under the mandate of serving the public and ensuring that their content reaches the widest possible public, the BBC and the Australian ABC have launched streamable program-content for their viewers. The BBC's iPlayer that was launched in 2006 is designed to facilitate "catch-up TV in the same tradition as the American networks now advance, but also a massive archive of content (James Bennett, 2008). The ABC's iView similarly is designed to recognize the different and non-television portals that Australians are using to access video content: certain programs in their entirety are available on the service.

These directions by existing broadcasters are not complete replacements of their broadcast worlds – they are extensions to a new platform very much like adding a new channel to a broadcaster's reach and distribution. Corporations that are replacing television with online delivery remain in niche and specialty markets. What may develop in future years are successful and new developments of media cultures in online worlds such as *Second Life*. At the moment, the existing media players have followed the hundreds of thousands of users and set up shop in *Second Life* in anticipation of its future value. Given that the social network model is primary to the experience of online worlds and may not match the organization of existing media entities, it is possible that genuine replacement media will emerge from these new sites of virtual experience. That kind of development is still in its infancy.

Conclusion

There is no question that there is a new layer of mediation that organizes and orchestrates our media use and our media industries. The Internet has served to extend existing media corporations quite dramatically; but in those extensions their form and their cores are transformed and mutating further. The nature of the Internet – one would have to say its core nature – is very much connected to new forms of interpersonal communication and personalized mediated explorations. The media industries have operated with great success throughout the twentieth century as "aggregators" – that is, they have been able to pull together massive audiences around particular cultural forms and practices. The organization of the advertising industry has underlined how well this model of aggregates has worked. The media industries' production of aggregates as audiences has been

compensated handsomely by advertisers. The change now is that aggregation is not quite enough as the old media and new media intersect. The development of audiences in this newly mediated and Internet sense also implies the development of information about the audience/aggregate for more accurate targeting of advertised messages. The generation of information necessitates engagement and interaction by the users of the Internet at a level that goes so far beyond older media's system of fan mail and talkback radio. The movement of media content and its ultimate value is at least partially determined by how much chatter and interpersonal exchange occurs through its form: Do social network site-users link or connect to certain videos or certain kinds of music and do they pass that on through their own personal site to others? Do blogs and LiveJournal sites cluster around a given cultural form? Do users feel so connected to a given media form to post it on YouTube and then further connect it to their MySpace and Facebook sites (for further discussion, see boyd & Ellison, 2007; Beer, 2007)? Do search engines such as Google in their elaborate algorithms that rank web-pages chart new aggregations of interest that may be connected to the old-media-generated content but have mutated to the discussions, mash-ups, and vids produced by active users? These various activities isolate on the information that is generated about the former aggregates developed by the media industries – what Thrift has called "knowing capitalism" – and they underline how media themselves are now involved in these layers of production that are happening at this user level (Thrift, 2005).

While these developments of new layers of mediation through interpersonal use are real and advancing, it is important to conclude that the media industries also realize that the past models are still working – perhaps not as strongly, but still quite well. The clear adaptation that is occurring is recognizing how a cultural form or product moves through its uses via the Internet and whether the values generated by that kind of information become subcontracted to companies with Internet expertise or whether the existing media industries recognize these new layers as fundamental to their business models and absorb these emerging entities. The newly mediated media industries are now becoming increasingly involved with how the Internet's interpersonal mediation is producing an equally newly mediated audience.

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