

To: "Jennifer Feikin" <jfeikin@google.com>, "Eva Ho" <eva@google.com>, "gracew" <gracew@google.com>, "Ethan Anderson" <eanderson@google.com>, "Brad Presner" <brad@google.com>
From: "David Eun" <deun@google.com>
Cc:
Bcc:
Received Date: 2006-05-05 00:39:51 CST
Subject: Rough draft Content Acq slides for Video GPS pack

All,

This is a really rough pack but you should be able to discern key points and direction. It's way to long and doesn't flow very well. Please insert content and note suggestions. Then please turn around to me and I'll synthesize one more time tmr morning NY time.

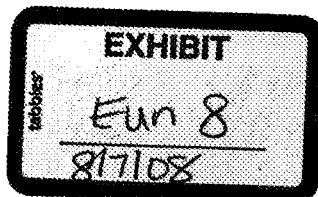
Thanks!

Dave

--
David Eun
NY: 212-589-8070
MV: 650-253-1993

Attachments:

CA Video GPS1.0.ppt



Market Evolution (Brad, Dave) [Timeline with usage/traffic growth and bubble overlays]

- "Everoyne hates Chris" launch on GV,
- iTunes launch with ABC
- YouTube launch
- GV launch at CES,
- CBS puts programs on 3 platforms (comcast, satellite, gv) plus their own .com
- iTunes announces 15 millionth video download (from email I sent from PaidContent estimating 700k iTunes sales/week)
- SNL "Lazy Sunday" puts YouTube on the map
- AOL launches In2TV
- Yahoo says it's scaling back on original programming,
- MTV announces re-org, big plans new media distribution, (let's also see if we can find out when they acquired iFilm and when their show on VH1 taking clips from iFilm first aired) (background bullet on ~4 similar "clips shows" on air and 9 in development)
- CBS streams NCAA championships for free and reports it generated \$4mm in revenues
- FOX closes landmark deal with affiliates
- NBC and affiliates form joint venture for new media distribution
- GV announces initiative to digitize NARA content
- ABC announces announces ad supported streaming trial of top shows
- MSN unveils new plans to create original pogramming
- Some bullet that speaks to tremendous growth rate/volume of user-generated content
- Others? This is a lot already but skews toward the "head" content; we may need more "tail" bullets and more about "torso",

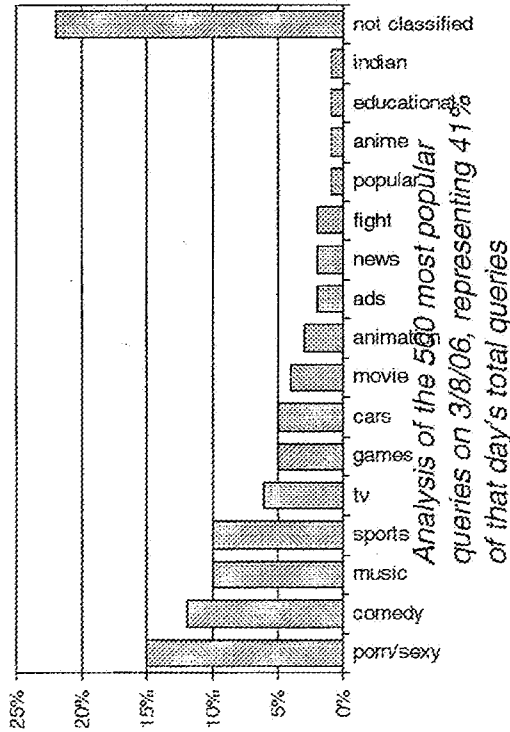
Message we're trying to communicate: The market is very young but extremely fast-moving; premium content owners have really become more aggressive and open to experimentation; user-generated trend is huge

2. How is GV doing? (Grace, Ethan, Jennifer, Dave)
 - What's "popular"? How do we measure it?
 - What are usage trends? (Types, genres, International)
 - Who is viewing what? (GV traffic vs. YouTube and others; US vs. International consumption)
 - What kind of content have we acquired (head, torso and tail; genres(?)) [Wendy Chang]

Placeholder – need to update

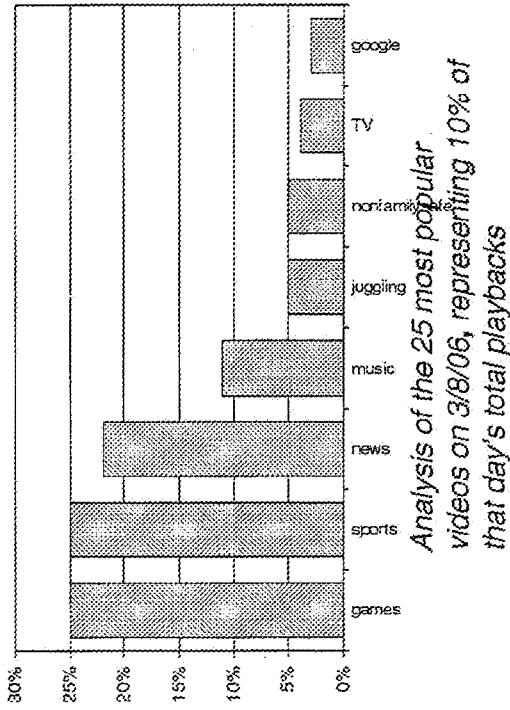
What are today's users seeking and watching?

Searches at video.google.com



Includes clicking of a Google-provided category link as a search for that category

Most Popular Playbacks at video.google.com



Sources: Daily Common Queries 3/8/06, Daily Top Videos 3/8/06, BizOps analysis

Placeholder – Ethan Anderson

International: We have to avoid being US-centric since more usage comes from outside the US, where there are big differences in taste and consumption across different countries

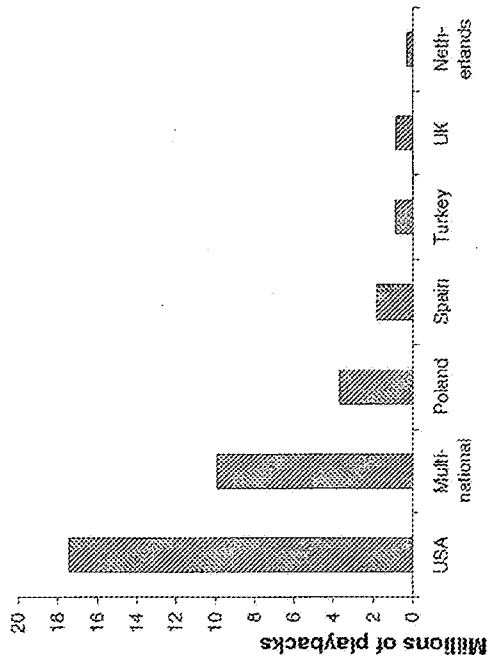
- 63% of our playbacks and 40% of our uploads come from outside the US
- Large fraction of videos have large majority of playbacks from a single country (Potential takeaway: different videos resonate in different countries)
- Playback and support for premium vs. user-generated content varies significantly across different countries (Germany vs. Spain)
- Most of the non-US top videos have titles/descriptions not legible in English
- Top videos in non-US countries typically don't get big US viewership

Placeholder - Ethan

GV should seek content with International appeal

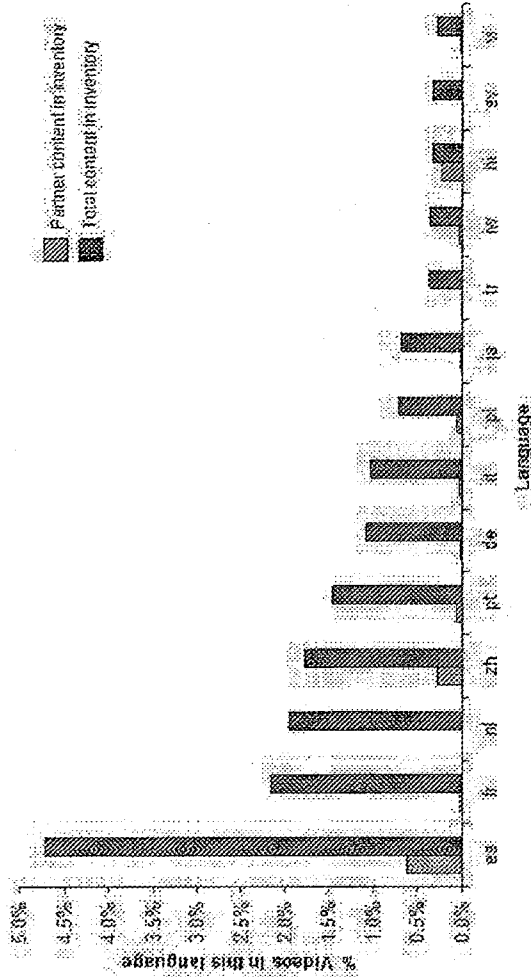
Highly Confidential

Which markets the top Google Videos hit



Total playbacks in April 06 for top 53 videos – “multinational” if top country had <35% of playbacks – from list of top 10 videos by country (Source: Taylor Van Vleet stats, BizOps analysis)

Penetration of Google Video Inventory by Language



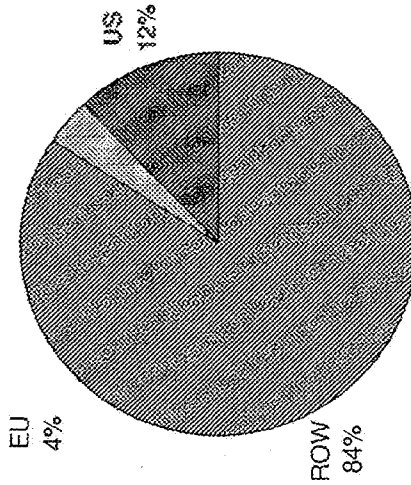
(Source: April 06 inventory status, Taylor Van Vleet stats, BizOps analysis)

G00001-00496070

Placeholder – need to update/Appendix

International production of television content is significantly larger than the US and EU, i.e., even within “premium television content” there is a long tail of content from different countries

Worldwide Television Annual Production Distribution¹

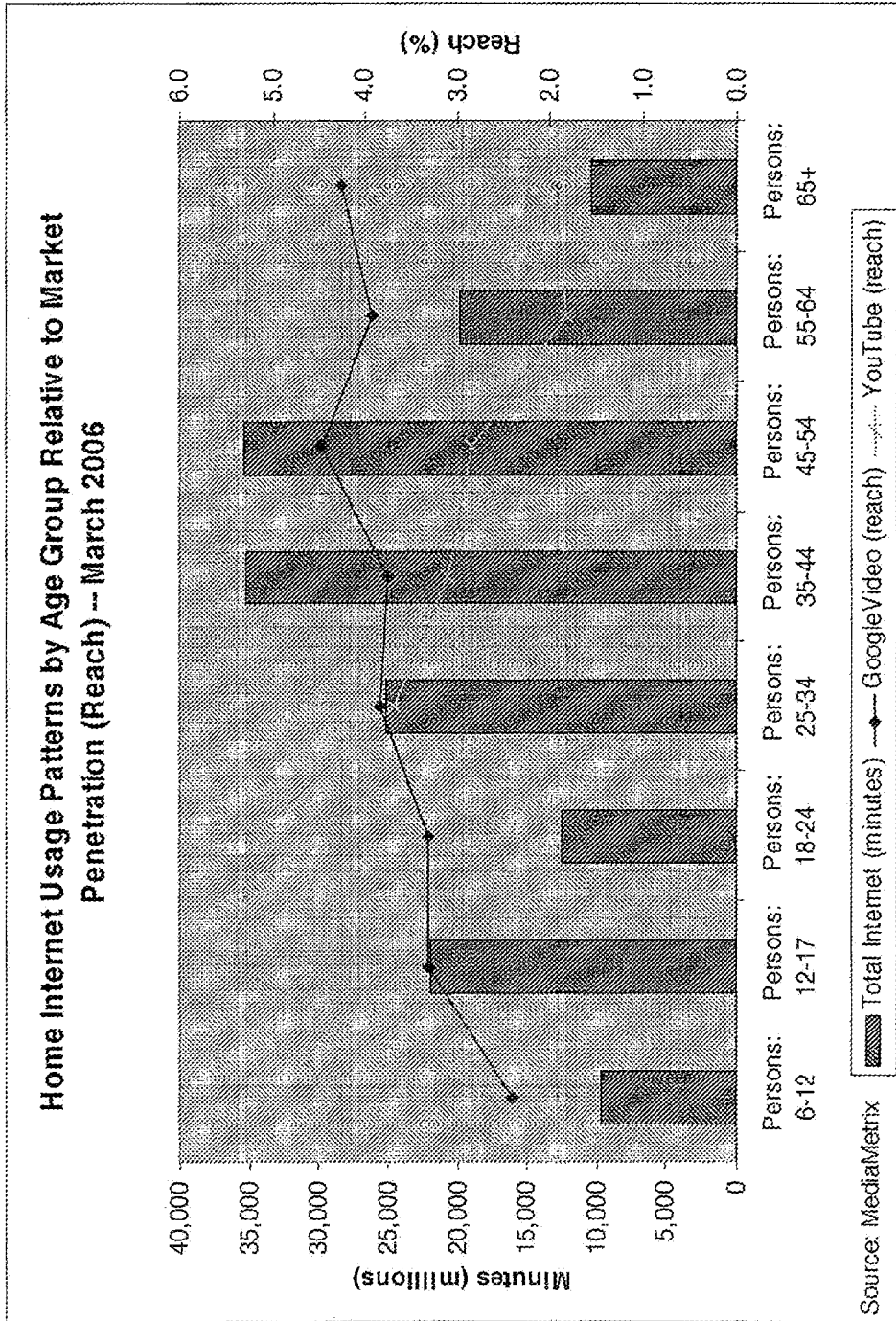


Total Annual Storage: 40,300 TB

Source: *How Much Information 2008*, UC Berkeley SIM; *Program Diversity and the Program Selection Process on Broadcast Network Television*, FCC.

Note (1): US distribution estimated based on 2002 prime time share of programming hours

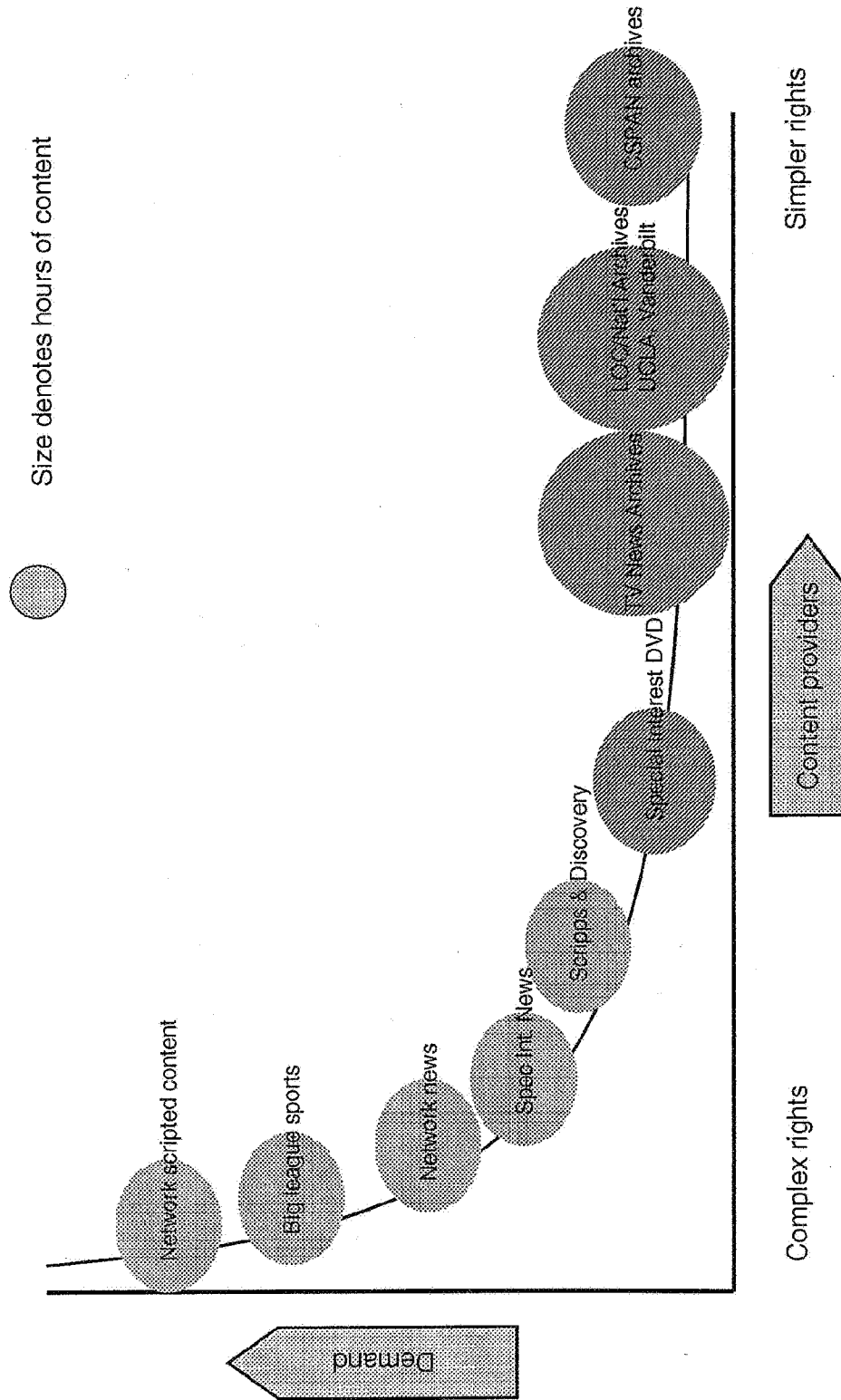
Who are our target users? What type of experience do we want to create for those users? Why do they look for video online?



Once we "catch up" to YouTube in its appeal to a younger demographic, which features should we explore next to capture larger segments of the market?

Placeholder – need to update (Wendy Chang)

Content Acquired



Map of Content Verticals Identified

Entertainment and Premium Content

- Major film companies (e.g., 20th Century Fox, Warner Bros., etc.) [ALL]
- Major television networks (e.g., ABC, NBC, CBS, Fox) [ALL]
- Independent film companies (e.g., The Weinstein Company, Spyglass Entertainment) [PI]
- Production companies (e.g., Endemol, Granada) [PI]
- Independent Producers (e.g., Charlie Rose) [PI, JL]
- Entertainment cable networks (e.g., A&E, Showtime, HBO, OLN) [JL]
- Sports leagues
- Talent agencies [PI]
- Music Labels [JL]

News and Information

- News networks (e.g., ABC News, CBS News, Fox News) (Note: Based on each partner's org structure, this may be included in the above vertical) [DB]
 - News cable channels (e.g., Bloomberg, CNN) [DB]
 - Information cable channels (e.g., Discovery, Scripps, PBS) [JL for now, may be MS]
 - Lifestyle/HowTo/DIY (e.g. Akimbo content) [MS]
 - Niche programming (e.g., expat sports, Bollywood films) [MS]
 - Alternative News Networks (e.g., Democracy Now/Public Advocacy Sources (e.g. Greenpeace, Amnesty) [DB])
 - Citizen Journalism/Video news blogs [DB]
 - Video Libraries/Archives/Museums** (e.g., NARA, Smithsonian, Academy of Television Arts and Sciences) [DB]
 - University Lectures [PI]
 - Instructional/Corporate Videos
- ### Film/Tape Archives
- Government
 - Private Film Archives
 - Museum
 - News Archives

Vertical prioritization analysis

- Who are the top companies in each target vertical?
- Do we already have these companies in the pipeline/with a deal?
- Which companies are left to target?
 - Has someone else already a deal? (at the moment, iTunes deals move to the front of our queue – is it more important to catch up, or differentiate?)
- Who to contact (function, title, location...)
 - Content team can pull tel #/email more easily than us...

Vertical prioritization Next Steps

- 1) do our own market analysis of what people want to watch online in an IDEAL world where they could get any and all content. in this analysis, find out what are the necessary requirements for them to want certain types of content. e.g., to watch longer form content, will they need a direct connection to their TV?, will they pay for certain types of content and not others?
- 2) are there certain niche verticals users will pay a premium for? the anecdotal evidence we have here says yes. A&E told us that civil war and WWII folks pay easily for this content. in addition, we know that certain business and medical lectures are sold for a premium. what other verticals are there in this bucket?
- 3) do an indepth logs analysis of google.com and [google video](http://google.com) to find out what people are querying about. again, once we get search fixed, and we get one box, we believe we'll have significantly more traffic based on search.
- 4) after finding out #1 - #3, figure out what companies/orgs have this data. the cuts on page 17 of the biz ops brainstorm is great for the standard partner team, but it's not as helpful for the premium team. for instance, A&E has drama, biography, history, etc., Dartmouth has lectures and speakers on several topics. we should figure out in addition to specific topics what types of companies hold this data. this is how we came up with our original verticals.
- 5) finally, be true to google's core of experimentation. that is why EMG supported the NARA deal and our idea of going after the long-tail content. so, in addition to focusing perhaps 50% of our efforts on data-driven verticals (e.g, most popular now, most popular in the future, easiest to do deals, etc.), we should have 50% based on sprinklings across multiple verticals. this is how we'll really find out what people are interested in, especially when we have ads.

3. Who and what are we competing against? (Grace, Dave)
 - Why do we consider them competitors?
 - How do we compare?
 - What are we competing for?
 - What can and can't we do in Content Acquisition given current product features and roadmap? (Jennifer, Grace, Dave)
 - Without disconnected DRM, can't do many DTO deals
 - If we relax copyright enforcement policies, this will jeopardize relationships with premium content owners
 - Etc., etc.

Backup/placeholder

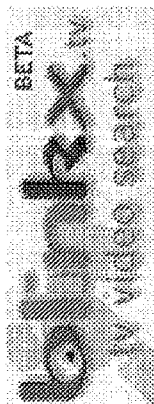
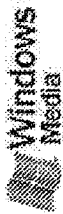
Competitive update

- MSN Video site offering searchable video from MSNBC, NBC, Showtime, Food Network, HGTV, Fine Living, Fox Sports, NASCAR, MLB
- Suite of technology, content and content distribution assets: Windows Media format & DRM, MSN Movies, MSN TV site, MSN TV hardware, Microsoft TV, Microsoft Windows Media Center, Portable media players, Comcast relationship, IPTV relationships with SBC, Verizon
- Windows Media codec support in 500 CE devices

- Indexes television and radio; links to playback on websites
- Speech to text used to develop transcripts
- Large # of major content providers represented

- Relevant properties: Yahoo TV, Yahoo Movies, ET Online, Apprentice, Yahoo Video Search (beta), JibJab
- Yahoo Living Room internal effort
- Experimenting with closed captioning search over TV content

- Watch clips of last night's popular programs online for free.
- Singingfish crawls the web for multimedia content (including audio)

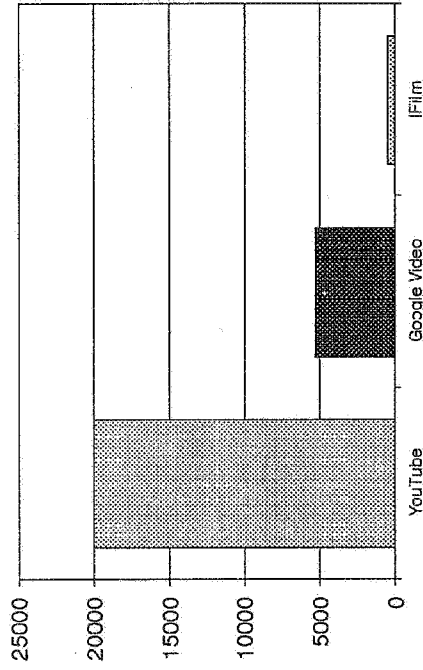


Leadership in online video services

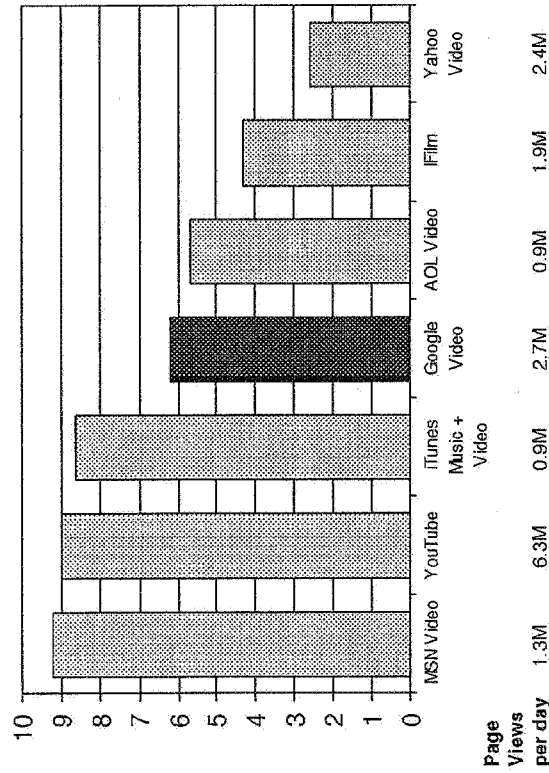
Placeholder – need to update

Today users spend time on....

Video Uploads per Day



Unique Visitors per Month (Millions)



Page Views per day

Sources: Nielsen, Mediamatrix, Google Video Dashboard

Backup/placeholder

Comparison of video efforts

	Overall Market			Google Position		
	User experience today	Current market leaders	Future technology advances	Google advantages?	Current resource deployment	Monetization potential?
Search	<ul style="list-style-type: none"> • Too few results – much video hidden • Have to hit multiple sites to find content • Results quality poor – many mismatches • Insufficient info about results (is it a playable video, even?) • Viewing experience inconsistent 	<ul style="list-style-type: none"> • Yahoo! Video Search • AOL Video 	<ul style="list-style-type: none"> • Filtered metadata <ul style="list-style-type: none"> – OCR on credits and captions – Scene changes • Object recognition • Video as extracts <ul style="list-style-type: none"> – Find info within video • Connection to video.google.com – Onboxed 	<ul style="list-style-type: none"> • Yes – requires top tech <ul style="list-style-type: none"> – Research – Images data – Processing power • Yes – have bulk traffic and monetization of search web (raw) • AOL partnership (Tribeca?) 	<ul style="list-style-type: none"> • Engineering 3 (Jeremy) – info should be zero according to PC • Search quality? on landing, 10% fraction of 3 – on Universal search (All B/) • FMs 	<ul style="list-style-type: none"> • Build on existing AdWords profile for Google Cdn – extend, universe and relevance of search results
Monetize	<ul style="list-style-type: none"> • Banner ads are typically an unwelcome distraction from content • Pre-rolls are annoying – particularly for short clips and search-within-clip 	<ul style="list-style-type: none"> • AOL Video (premium ads with In2TV) 	<ul style="list-style-type: none"> • Better contextual ad targeting 	<ul style="list-style-type: none"> • Existing AdSense network • Ad targeting technology 	<ul style="list-style-type: none"> • Engineering 2/5 FTEs • 3.5 FTEs on video ads (Lijf) • FMs 	<ul style="list-style-type: none"> • Chop up AdSense to premium advertisers who require multimedia experience
Entertain	<ul style="list-style-type: none"> • Back-to-back play on Google Video 	<ul style="list-style-type: none"> • Equivalents: <ul style="list-style-type: none"> – Broadcast TV channels – Internet radio 	<ul style="list-style-type: none"> • More bandwidth • Clever compression • Channel targeting systems • Mobile video 	<ul style="list-style-type: none"> • Maps for easy ad play? 	<ul style="list-style-type: none"> • Engineering 2 (Jeremy) • FMs 	<ul style="list-style-type: none"> • Could build on other expertise? • Could pick up existing optimized content
Host/ Enable Payments	<ul style="list-style-type: none"> • Improving interface at iTunes and Google • Pricing inconsistent across sites • Insufficient content • Pre-rolls are annoying 	<ul style="list-style-type: none"> • iTunes (host and payment) • YouTube (host only, no payment) • Google (host, pay enabled for limited content) • Netflix, Blockbuster (offline only) 	<ul style="list-style-type: none"> • Added content • More DRM options • Improved viewing tools • Mobile video 	<ul style="list-style-type: none"> • Not for Premium – less content for multi-channel than other players • Yes for Standard – leave payments, public/private edu links • Yes for Free – have storage capacity for long tail 	<ul style="list-style-type: none"> • Engineering 14/7+ (11/7+) • Staff 2 (Jeremy) • CSC • FSO/6/7 • Player/5/1/6 • Content 	<ul style="list-style-type: none"> • Premium content – better requires that per view – limits ad revenue potential (copyright owner restrictions on ad placements in their redress) • Free can support ads

Placeholder - Jennifer

What we can't do with current product roadmap

- Many content owners won't do deals without:
 - Disconnected DRM/limited downloads/limited devices
 - Sharing store analytics and recommendation engines information
- Many content owners want to explore multiple monetization options beyond DTO
 - Currently "Tipjar" or text ads monetization trials are not on roadmap
- GV ability to make content universally accessible is limited without title/description/metadata translation, subtitle translation, dubbing
- GV vision to offer most comprehensive video offering would be enhanced with improvements in video web search
 - Specifically, improvements in metadata extraction and search/browse/rank
- GV capability to digitize from film (as opposed to tape) is limited **[more details from Grace]**

4. How do we win?

GV can use scale and expertise to have most comprehensive content offerings – from head to tail

- Content types: premium, user generated, torso - which is key differentiator (show curve and add comments)
- Content genres/verticals: entertainment, sports, lifestyle/how to/DIY, archives, news, education, niche, etc. (Jennifer, Grace, Eva/Jon, Dave)

GV can be best user experience

- Improve search not just hosted content but for all web video content
- Provide linkages such as RSS feeds and one-box integration in meantime
- Drive open standards and distribution deals so users can consume content across multiple devices, especially linking PC to TVs

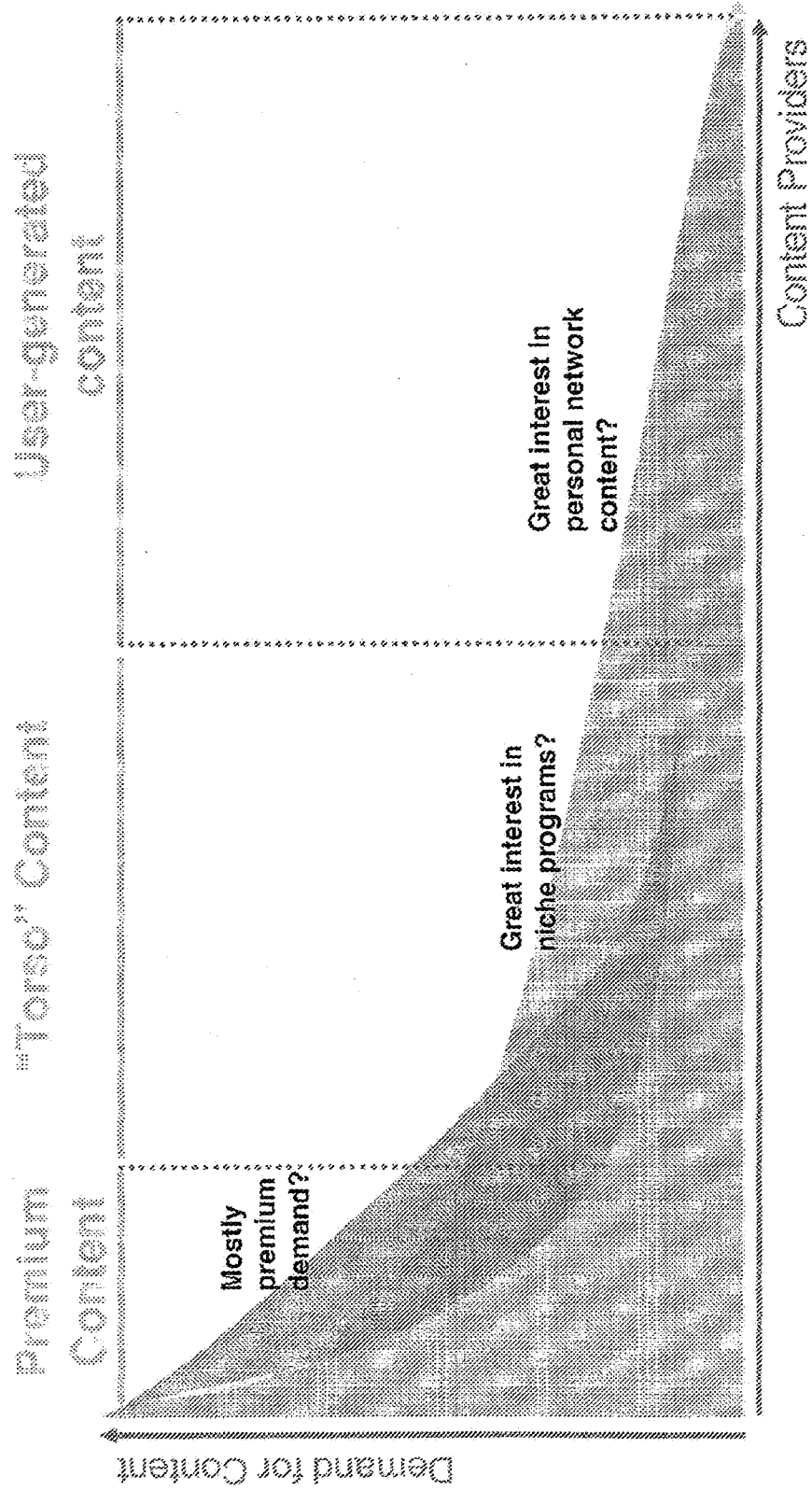
GV can be best partner to content owners

- Respect copyrights of premium content owners (we should beat YouTube by improving features and user experience, not being a “rogue enabler” of content theft)
- Provide best in class marketing/promotion of content, particularly “event” programming: Online Film Festivals; supporting “Tentpole” movie and tv shows launches; Superbowl ads; Oscar trailers/content; (Jennifer, Eva/Jon, Dave)
- Provide a platform for promotion and distribution for torso content owners who have professional content but limited access to audiences
- Provide community tools for voting, rating, tagging, commenting, recommending, mashing, etc. and give access to all types of content, including select premium/torso content

GV can provide multiple monetization options (Advertising; Sponsorships; DTO) and leverage expertise in Advertising in particular

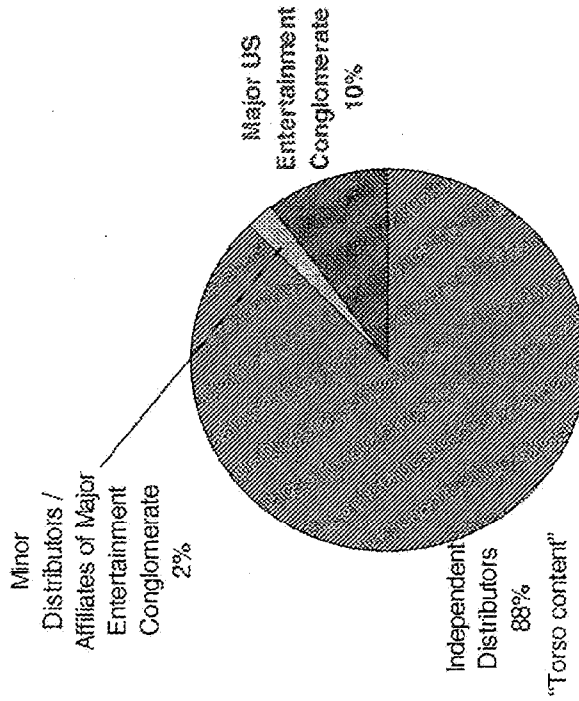
- The way to win ultimately is in providing multiple monetization options, particularly advertising which can be applied across all content types

GV can use scale and expertise to have most comprehensive content offerings – from head to tail – and influence overall consumption curves



Backup/placeholder – to make point about importance of Torso content
If comprehensiveness is ultimately how Google wins, then Google's ability to acquire "torso" content will be the differentiating factor

Worldwide Film Inventory Distribution



Total Inventory Storage: 721 TB

Source: *How Much Information 2003*, UC Berkeley SIM; International Film Index; Internet Movies Database.

Placeholder – Dave/Jennifer

2006 Content acquisition team priorities

- Maintain relationships with premium content owners:
 - Take advantage of improved browse/search/promotion capabilities
 - Seek “improved DTO” deals with dynamic homepage and one box integration
 - Drive traffic through “event” programming
 - Seek promotional content (movie trailers, behind the scenes, first 8 minutes, streamed premiere tv episodes, commercials)
 - Set up advertising trials
- Accelerate growth of “torso” content:
 - Take advantage of GV ability to offer promotion, traffic, tools for premium content owners who don’t have scale
 - Take advantage of more relaxed DRM requirements among this class of owners
 - Realize very few competitors will have resources or expertise to identify and close large volumes of torso content
- Acquire content with more international appeal
 - Other dubs/subtitled versions of existing content
 - Language-independent, broad appeal content (no voiceover)
 - Content created in Spanish, French, Dutch, Chinese, Portuguese, German, Italian, Polish, Japanese from non-US providers
- Digitize NARA tape archives and other compelling video assets

Views of Premium Content Owners

On YouTube:

YouTube is perceived as trafficking mostly illegal content -- "it's a video Grokster"

Because YT is not making money and not negatively impacting sales of DVDs or other revenue streams -- yet, content owners consider them a de facto promotional platform, but are monitoring them closely

Just because content owners haven't taken more aggressive actions against YT and others to protect their assets doesn't mean they won't; they likely will

YT is seen as a small startup with no cash

On Google:

Google is considered a "real company" that appreciates what it takes to build billion dollar businesses, so expectations of Google are different

But Premium Content owners still don't know whether Google is friend or foe

If Google were to facilitate the theft of copyprotected assets owners have invested in, then it would significantly impair Google's ability to work with owners in the future

Google is a deep pocket and therefore worthy of a precedent-setting lawsuit

Premium content has wide appeal worldwide; no matter how consumers feel about user-generated content there will always be a need for premium content

On Monetization:

Want to explore DTO and create alternative to iTunes, but want disconnected DTO, lower download limits and more effective promotion

Agree that advertising has huge potential and want to work with Google

Are willing to explore lots of different approaches and don't expect to make a lot of money -- now; emphasis is more on learning and signaling to Wall Street that they are figuring out how to migrate business models to the web

Video monetization possibilities

1 Sponsored Video – requires high-touch premium content to premium advertiser matching – needs top content and TV-style CPMs to work

	# of people interested in seeing video*	\$ amount advertiser will pay		movie length (mins)	minutes per ad	# ads per stream	advertising content owner	\$ value to content owner	\$ each advertiser pays
		CPM	Per stream						
911 Loose change	4,560,448	\$ 10.00	\$ 0.01	82	15	5	75%	\$ 171,017	\$ 45,804
Amazing juggling	2,521,234	\$ 10.00	\$ 0.01	2.5	2	1	75%	\$ 18,909	\$ 25,212
Airbus build plane	412,772	\$ 10.00	\$ 0.01	7	3	2	75%	\$ 6,182	\$ 4,128
Octopus eats shark	201,412	\$ 10.00	\$ 0.01	2.5	2	1	75%	\$ 1,511	\$ 2,014
Jessica Simpson - These boots are made for walkin'	10,000,000	\$ 10.00	\$ 0.01	4.1	2	2	75%	\$ 13,333	\$ 100,000

2 Tip Jar – “busker” or “shareware” model may deliver strong incentives to user uploaders but nothing to corporate partners (Google would pass through all fees)

	# of people interested in seeing video*	Fraction who will tip	Average tip	\$ value to content owner	Rationale for tipping guesses
Amazing juggling	2,521,234	2%	\$ 0.50	\$ 25,212	Viewers impressed - see single beneficiary with talent
Airbus build plane	412,772	0.10%	\$ 0.02	\$ 8	Low tip rate - corporate promo video
Octopus eats shark	201,412	2%	\$ 0.25	\$ 1,007	Viewers impressed - see single beneficiary with good content
Jessica Simpson - These boots are made for walkin'	10,000,000	0.10%	\$ 0.25	\$ 2,500	Low tip rate / its thought tip goes to Sony

3 Text ads – familiar Google technology accessible to smaller advertisers can monetize standard partner and user content (Google could keep a fraction of ad revenues)

	# of people interested in seeing video*	CTR	CPC	movie length (mins)	minutes per ad group	# ads on screen at a time	# ads per stream	\$ value to content owner	\$ each advertiser pays	clicks each advertiser sees	
											911 Loose change
Amazing juggling	2,521,234	0.50%	\$ 0.25	2.5	2	4	4	75%	\$ 9,455	\$ 3,152	12,606
Airbus build plane	412,772	0.50%	\$ 0.25	7	3	4	8	75%	\$ 3,096	\$ 516	2,064
Octopus eats shark	201,412	0.50%	\$ 0.25	2.5	2	4	4	75%	\$ 755	\$ 252	1,007
Jessica Simpson - These boots are made for walkin'	10,000,000	0.50%	\$ 0.25	4.1	2	4	8	75%	\$ 13,333	\$ 12,500	50,000

* based on April 2006 actual playbacks (except Ms Simpson)

Source: Playbacks and movie length real data (apart from Ms Simpson); all else “what-if” analysis by BizOps

Appendix

Backup/placeholder Potential Content Segments/Verticals

Cars	Religion	Music	Choirs	Hobbies	Arts & crafts
oil cos	Sports		orchestras		Animal
classic car groups	Baseball cards		theater companies		Motorcycling
car magazines	Olympics		opera companies		quilting
AAA/RACIA	leagues		instrument manufacturers		angling/bass fishing
mechanics	learn		academies		shooting/hunting
kwik-lyft/lube	channels		bands		poker/cards
unions	news 50s		recording studios		games
	Film companies		record labels		skating
Home	studios		auctioneers of famous instruments		sewing
realtors	actors	Travel	members of committee		running
home sellers	agents		local tourist agencies		walking
DIY stores			air lines		golf
lumber yards			hotels		writing
home and garden channel	TV stations		tour companies		marial arts
landscape gardeners			gruises		collecting
painters	Industry Associations		airports		swap meets
paint companies	Schools		boats	Conventions	Magic
Martha Stewart	Departments		transit authorities		scifi
solutions/size companies	Local/State/federal		series		star trek
surveyors	Government		TV channels - editorial on travel		DnD
mortgage banks	Ad agencies		Travel writers e.g. Rick Steves	Food	Cooking groups
surveys on prices	Publicity-seeking individuals		Local development agencies		restaurants
construction cost/builders	Individual podcasters		Bicycle manufacturers		cooking on TV
local authority planning dept			Cyclist groups		farmers/farms
postal authorities					agribiz
plumbers		Minority /	scholarship/gifts		
oil cos	Unions		African-american	Universities	Fraternities/Sororities
Nuclear			Women		Intercollegiate competitions
Electricity			senior citizens		Research output - simulations dissertations
Gas			veterans		Recruiting - undergrads, PhDs, uni vs dept
Solar			disabled		Sports teams
Wind			Asian-american		Presentations/award ceremonies
Debra's 1000 various skills			Latino		Graduation ceremonies
			Equal ** in **		On-campus speakers
Children					Alumni events
TV channels					online classes
Movie studios					film and tv class exercises
Toy companies					theatre class productions
Public service education					debates
Sessaris Street					ultimate frisbee
Parenting - health & social servs					engineering/solar power competitions
Drug cos					self-help/medical for depression, drugs...
					time management for research
					internal/onal student offices
					public service/volunteering groups
					events

Backup/placeholder

Prioritization of effort to get content deals by vertical -- proposed scoring system

Vertical	Interest to user	Industry revenues	Industry concentration	Emphasis on/amount of video content	Willingness to share video	Overall score
Example: entertainment - circuses	7	3	10	7	10	Weighted total $\Sigma = 72$
Purpose	Do our users want to watch the video?	How important is this industry?	Is the value of the companies in a deal worth a phone call or should we just bulk email instead?	Is there much richness of video here?	Will anyone actually sign the deal?	
Direction and Scale	Scale linearly with demand (search volume)	Score in exponential ranges 1-10	Score = % of revenues held by top 10 players/10	Subjective score from 0 (never make videos) to 10 (video is their business)	Regulation and secrecy of industry vs desire for publicity	
Weighting	5	1	1	2	1	
Source	Google.com and video.google search data; news reports, blogs, Nielsen TV ratings	US Census data (2002)	US Census data (2002)	From team discussions	From content team feedback -- adjust over time	

Where do we fit today's 2006 marketing plan in as a consideration/weighting?

Content: Example of vertical concentration ranking

2002 NAICS code	Meaning of 2002 NAICS code	Consolidation Ratio Code	Year	Receipts revenue (\$1,000)	Rank of firm
711101	Casinos	4 largest firms	2002	\$102,866	1
713102	Amusement parks (except waterparks)	4 largest firms	2002	\$5,623,152	1
711222	Auto race/track operation	4 largest firms	2002	\$1,380,430	1
713101	Waterparks	4 largest firms	2002	\$2,565,658	1
711221	Dog race/track operation	4 largest firms	2002	\$427,228	1
711101	Opera companies	4 largest firms	2002	\$130,430	1
713201	Suit machine operators	4 largest firms	2002	\$135,359	1
713222	Horse race/track operation	4 largest firms	2002	\$1,471,452	1
711101	Dance theaters	4 largest firms	2002	\$147,543	1
711102	Other performing arts companies (except circuses)	4 largest firms	2002	\$182,242	1
711201	Professional athletes	4 largest firms	2002	\$112,248	1
712302	Leisure, bingo, boards, & other betting operators	4 largest firms	2002	\$1,338,115	1
711212	Baseball clubs	4 largest firms	2002	\$137,024	1
711101	Symphony orchestras & chamber music organizations	4 largest firms	2002	\$200,001	1
713901	Dance halls	4 largest firms	2002	\$15,795	1
711213	Other professional sports teams & clubs	4 largest firms	2002	\$850,556	1
713905	Coin-operated amusement devices (except slot machine operation)	4 largest firms	2002	\$256,680	1
712909	Other fitness & recreational sports centers	4 largest firms	2002	\$126,646	1
713902	Concession operators of amusement devices & rides	4 largest firms	2002	\$65,352	1
711211	Football clubs	4 largest firms	2002	\$289,655	1
711212	Racing (except jockey/track operation)	4 largest firms	2002	\$10,159	1
711102	Theater companies	4 largest firms	2002	\$550,289	1
713603	Miniature golf courses	4 largest firms	2002	\$25,725	1
713904	Ice skating rinks	4 largest firms	2002	\$26,851	1
711303	Other music groups & artists	4 largest firms	2002	\$173,577	1
713901	Roller skating rinks	4 largest firms	2002	\$18,475	1
713903	All other miscellaneous amusement & recreation services	4 largest firms	2002	\$105,131	1

As we tee up suitable approaches for marketing to reach the content owners, horizontal groupings may also be useful

Organizations have reasons to make video...

Sell	product
	service
Recruit	employees
	students
Raise funds	Charity
	politics
Teach	children
	adults
Train	employees
	users/drivers
Safety	consumers
	product users
	public
Promote/Justify	Religion
	industry
	politics/interests
	cause awareness
Record/Archive	Event (personal)
	Event (social)
	Event (natural)
	Sequence (project)
Compete	ideas
Peer review	Academic seminars
	Conferences
News/Editorial	
Entertainment	
Ads	multi languages
Language translation	employees
	New markets
Fame!	

...and functional owners for the content

Job Title Keywords

HR	recruiting
	health & safety
	training
	relations
	compliance
Marketing	brand
	marketing
	product
	promotions
	publicity
	events
	fundraising
	alumni
	sponsor
Membership	membership
	affairs
	outreach
Writing	editor
	localization

Stats on the competition

	Google Video	AOL Video	Yahoo Video	iTunes Video	YouTube	iFilm	Blinkx-TV	MSN Video
Unique visitors per month	<ul style="list-style-type: none"> 6.2M Feb 06 Nielsen 	<ul style="list-style-type: none"> 5.7M Feb 06 Nielsen 	<ul style="list-style-type: none"> 2.6M Jan 06 MediaMatrix 	<ul style="list-style-type: none"> 8.6M (includes video and audio) Jan 06 MediaMatrix 	<ul style="list-style-type: none"> 9.0M Feb 06 Nielsen 5M per day YouTube CEO ZNet Blog 3/14/06 	<ul style="list-style-type: none"> 4.3M Feb 06 Nielsen 	<ul style="list-style-type: none"> 16K Feb 06 Nielsen (insufficient sample size for reliable estimate) 	<ul style="list-style-type: none"> 9.2M Feb 06 Nielsen
Page views per day	<ul style="list-style-type: none"> 15.7M 3/24/06 Video Google Internal Dashboard 2.7M Feb 06 Nielsen 	<ul style="list-style-type: none"> 945K Feb 06 Nielsen 	<ul style="list-style-type: none"> 2.4M Jan 06 MediaMatrix 	<ul style="list-style-type: none"> 900K (includes audio and video) Jan 06 MediaMatrix 	<ul style="list-style-type: none"> 5.3M Feb 06 Nielsen 	<ul style="list-style-type: none"> 1.9M Feb 06 Nielsen 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> 1.3M Feb 06 Nielsen
Videos streamed per day	<ul style="list-style-type: none"> 8.7M 3/8/06 Google video dashboard 	<ul style="list-style-type: none"> <8M based on 8M queries/day MediaPost 6/9/05 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> >100,000 750,000/wk. paidcontent.org 	<ul style="list-style-type: none"> 25M+ YouTube About Us 3/24/06 	<ul style="list-style-type: none"> 1M est. based off of ifilm.com claim of 30M+ videos streamed monthly 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A
Videos in inventory	<ul style="list-style-type: none"> 525,890 on 3/8/06 Google video dashboard 	<ul style="list-style-type: none"> 18,000 licensed VOD 20M indexed MediaPost 6/9/05 includes extensive library of Time Warner content 	<ul style="list-style-type: none"> Est. 16M indexed 3/27/06 	<ul style="list-style-type: none"> 3,000 for sale podcasts (includes audio and video) 3/27/06 iTunes.com 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Claims "largest" collection of viral and user generated video along with [other] clips" 10/13/05 press release 	<ul style="list-style-type: none"> 1M hours 3/27/06 Blinkx-TV est. 10M-20M videos indexed based on average clip length of 3-5 minutes 	<ul style="list-style-type: none"> N/A
Partners	<ul style="list-style-type: none"> CBS Charite Rose NBA NBC Olympics AOL 	<ul style="list-style-type: none"> Forbes.com Blastro.com EVTV1.com PC World GameTrailers.com Google AtomFilms CBSnews.com 	<ul style="list-style-type: none"> TVO CBS Bloomberg Discovery Channel MTV Reuters Home & Garden The Food Network VH1 	<ul style="list-style-type: none"> Disney ABC NEC MTV ESPN Sci Fi Channel Comedy Central Nickelodeon Showtime 	<ul style="list-style-type: none"> MTV2 Matecor Records 	<ul style="list-style-type: none"> News Corp Sony Time Warner Walt Disney Microsoft HP Dell Intel Others 	<ul style="list-style-type: none"> ITN MIVA network CNN National Geographic History Channel HBO ESPN Others 	<ul style="list-style-type: none"> Associated Press NBC Showtime AtomFilms Digicast Discovery Channel NHL LatLink.com Scripps Network Weather.com Ward TV
Uploads per day	<ul style="list-style-type: none"> 5,208 on 3/8/06 Google video dashboard 	<ul style="list-style-type: none"> Total uploads: 17,850 on video dashboard 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> YouTube press release 2/14/06 	<ul style="list-style-type: none"> 3/13/06 NYTimes 	<ul style="list-style-type: none"> Media Research 	<ul style="list-style-type: none"> hundreds of hours added per week" 2/27/06 press

Digitization analysis (NARA focus)

- Understanding/data gathering
 - Current pilot operations
 - Lessons learned from Print
 - NARA inventory by format
 - Process for acquiring used equipment (and overlaps in functionality between player formats)
 - Quality needed for archive format
 - Revisiting/updating cost model assumptions
 - labor (in vs outsource, on vs offshore by operation step)
 - equipment (acquisition, maintenance, expected life)

- Hypotheses we are testing
 - Appetite exists to tackle (what fraction of) archive content (with what monetization model)
 - Enough used equipment is available to start a larger-scale pilot operation to prove demand for the content
 - We could build our own (re-/de-specified) equipment with minimal Sony componentry which could offer more consistent performance than used equipment for a scale-up beyond NARA
 - We could take rewind offline onto a separate, basic machine (if machines are the constraint)
 - We could digitize all (NARA) tape first, then target specific film for higher-quality acquisition later (based on demand?)