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Wagging the Long Tail:

Digital Distribution and Peripheral Screen Production Industries

In the context of digital media convergence, Richard Harris in his recent monograph *Film in the Age of Digital Distribution* (2007) acknowledges the need for urgent Australian research into the future of the screen production industry when he says, “I believe that government and industry need to stand back, take a long hard look at where the industry is likely to go over the next ten to twenty years, and start asking questions about the future place of content within it” (Harris, 2007, p.61). He asks questions including ‘how do we navigate this emerging media landscape?’, ‘how can Australian films take advantage of these opportunities and challenges?’ and ‘what innovative approaches are there for distribution?’ As the consumer market, especially among the under 25s, becomes increasingly fragmented and divided into niche audiences (Balnaves, O’Regan and Sternberg, 2002; Epstein, 1998; Frank, 1997; Green, 2003; Maffesoli, 1996; Quart 2003; Rheingold, 2002), delivering stories to this diverse marketplace is becoming an increasingly complex task. Emerging technologies, platforms and formats further complicate the picture. New approaches to narrative and interactivity are already being considered as the Australian screen industry adapts to mobile entertainment devices. New technologies also provide an environment in which the distinction between producer and consumer is breaking down. While audiences still demand and enjoy quality professional product, their active personal experience of media production means that they are no longer content to remain bystanders to the production process. The terms ‘pro-sumer’ (Toffler, 1980) and more recently ‘prod-user’ (Bruns 2006a, 2007) have been coined to describe the role of the consumer as co-creator of content.

The traditional model of distribution, based on the pre-selling of distribution rights to broadcasters and/or cinema distributors to finance a film or television program, gives the gatekeepers (television programmers, commissioning editors, film distributors, financiers) ultimate power to determine which stories will be made available to the public. Much has been made in marketing, new media and creative industries circles about the potential for new models of digital distribution to by-pass traditional gatekeepers (Anderson 2006; Bruns 2006a, 2007; Jenkins 2006), enabling producers to immediately and cost-effectively distribute their product to targeted niche audiences. Both academics and senior members of the Australian film industry interviewed by the authors are engaged with this idea, but the value – and indeed the mechanics - of digital models of distribution remain largely unexplored by academics. This paper will discuss emerging trends around digital distribution and flag how shifting public media consumption habits and developing digital media and communications technologies (mobile, wireless and Internet) are influencing screen distribution.

It is important to first clarify what we mean here when talking about new possibilities for distribution. Clearly, dedicated audio-visual user-generated content sites, the most famous of which is YouTube but there are many others¹, enable the near immediate global distribution of all sorts of film content. Everything from expensive high-end teaser campaigns, official trailers and professionally produced copyrighted material through to pet, holiday and baby videos finds its way

into this digital realm. Most of it gains a very limited audience of friends and family (if any at all), but a few choice pieces are able to gain an international profile. One of the more famous of these on YouTube was the now notorious *LonelyGirl16*, which also points to another important feature of user-generated video content sites: what you see isn't always what you're getting. At a time when user-generated content is becoming increasingly popular, much of what passes for 'authentic' user-generated content—low production values, hand-held or desktop camera feel, candid camera aesthetic and all—is in actual fact professionally produced (Burgess and Green 2008). But the concern of this paper is specifically with the new possibilities for distributing feature length pro-am or professional content, and the way in which film production is engaging with the new multi-platform environment (de Roeper and Luckman, forthcoming).

At the forefront of new thinking around online distribution is Chris Anderson's 'Long Tail' (Anderson, 2007). In his own words:

The theory of the long tail can be boiled down to this: Our culture and economy are increasingly shifting away from a focus on a relatively small number of hits (mainstream products and markets) at the head of the demand curve, and moving toward a huge number of niches in the tail. In an era without the constraints of limited shelf space and other bottlenecks of distribution, narrowly targeted goods and services can be as economically viable as mainstream fare. (Anderson 2007, p. 52)

Narrowly targeted film goods, for example, are potentially economically viable as the online world can now operate as a low-cost shopfront for a film title. As the theory goes, a mix of peer and word-of-mouth networks, the sophisticated user-preference tracking behind commercial websites like Amazon and iTunes, and savvy niche marketing legwork collide in this moment to provide, for some, a perfect storm of possibility for by-passing traditional gatekeepers. Anderson compares the number of titles even the largest 'big box' retailer (such as Borders or JB Hi Fi in Australia) can afford to keep displayed in expensive retail locations, as compared to the low costs associated with Amazon storing low turnover titles in a huge warehouse in rural America. In short, for the later it is possible to keep on the books even the most obscure title as the real costs associated with doing so are next to zero. The breadth of material available online, and not just from recognised retailers, has therefore led to a 'longer tail'; that is, an extension in the number of titles available beyond the hits dominating the shelves of the high street through basic economic logic (see Figure 1). As more of us become accustomed to being able to access more obscure and specialised content, and comfortable with mail order buying culture, more content is added and the tail 'thickens' (see Figure 2). As the economic and cultural landscape changes around them, the film industry wishes to avoid the mistakes of the music industry which tried to hold back the tide and instead cling desperately to its old business models (see deRoeper and Luckman, forthcoming), that is until a brash outsider in the form of Apple's iTunes came in and showed them that there could be money in them there downloads (Luckman 2008). The 'long tail' is thus the space now being targeted as a growth site for professional film distribution.

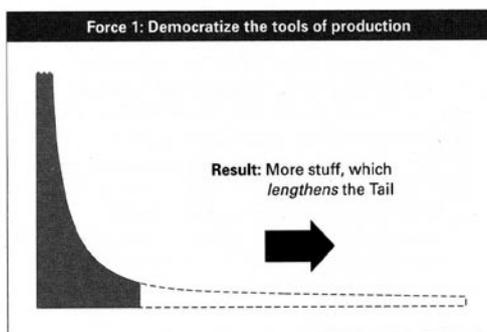


Figure 1: Anderson 2007, p. 54

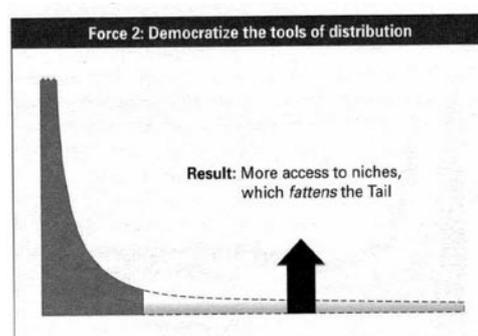


Figure 2: Anderson 2007, p. 54

New Distribution Pathways: The Peter Broderick Model

At the forefront of maximising the potential of creative new distribution channels for film content is US consultant Peter Broderick (<http://www.peterbroderick.com/>). Broderick—aka the ‘niche guy’—a ‘back by popular demand’ regular at the SPAA (Screen Producer’s Association of Australia) Fringe conferences, advises filmmakers on how to wag the long tail of online distribution. Some of the key strategies Broderick talks about include:

- ‘nurturing interactive online communities and networks’ genuineness’ (SPAA Fringe, Sydney, November 2007)

The independently produced *Four Eyed Monsters* is an exemplar Broderick offers of this approach (<http://foureyedmonsters.com/>; Screen Hub 2007b). The initial film “tells the true story of how Susan and I met online and I stalked her at her work and then we ended up dating but with a rule to never speak in person. Then our lives and minds begin to meld and our fantasies and fears manifest as we become a living breathing Four Eyed Monster.” (<http://foureyedmonsters.com/>) *Four Eyed Monsters* started off maximising the novelty of being the first feature film premiered in Second Life, at a screening attended by avatars in their glad rags. Among other ‘firsts’ it was the first feature film made available on YouTube, and then via My Space (<http://foureyedmonsters.com/>). By this point it had garnered quite a few viewings, so they shifted up a key notch and invited user-responses to film, sent to site. Its lively and constantly updated website is, Broderick observes, a model of how to do things right to keep people coming back; indeed, to make them feel part of the wider storyworld community of the film. Key among the strategies a successful tie-in website should employ:

- ‘You need to make sure your site is easy to post to and add content to, as easy as sending an email’ (SPAA Fringe, Sydney, November 2007)

To help to retrospectively repay the production costs and subsidise future production the website employs a number of strategies. Employing a model akin to that operating around other websites, such as social networking sites, \$US1 is provided to the film producers for everyone re-directed to an advertiser’s site. They have also included a mechanism to encourage people to donate to get the filmmakers out of credit card debt (the *Four Eyed Monsters* producers humanised this reality by adding pictures of them cutting up credit cards as they go which made real the donations made by fans). Further along these lines, and building upon the success of Kevin Smith, make people feel like ongoing collaborators or mentors of you, beyond the scope of any individual project; this lets you build money for the next project’ (SPAA Fringe, Sydney, November 2007). Think also about what you can sell from your website: DVDs, CDs, T-shirts, even if you just start out with home produced stickers is this a quote? (SPAA Fringe, Sydney, November 2007). The producers of *Four Eyed Monsters* are now about to make a deal with a distributor – delivering them an audience as large? as the initial content (which is an important and obvious shift to much of the commercial activity now going on around new media). At the heart of what is going on here is a very Australian virtue, namely being an underdog is something you can use in your favour; it lends you, he argues, ‘authenticity and genuineness’ (SPAA Fringe, Sydney, November 2007).

Also in the Broderick stable is what could be called the ‘Tupperware model’ – not for its pyramid selling qualities, but for its quality of using old media and mechanisms to get into peoples’ homes and communities, as it appeals to people on the basis of good, old fashioned shared communities of interest. While making and copying film texts might be accessibly affordable as a result of recent innovations in digital technology, ultimately the lesson of the long tail is an old one: target your marketing to communities of interest. So, as Peter notes, few companies—let alone individuals—can afford large-scale, non-targeted advertising campaigns (such as free-to-air TV advertising), but

a quarter page ad in a hobbyist magazine is within the reach of most niche producers. Couple this with grass roots community screenings, advertised via traditional niche print media (such as the hobbyist or community publications), online and SMS notifications to interested subscribers, and getting the 10 most important sites around your film's content to review your film and/or write up an article, and you have the basis of a sophisticated targeted niche campaign.

The value of this approach can be best assessed through a quick look at some of its success stories:

- *Being Carabou* – distributed via grass roots screenings, especially through group networks likely to be sympathetic to or interested in the content such as bushwalking and environmental organisations (<http://www.thefilmconnection.org/films/332>);
- Ditto *This Old Cub* (2004) 'The inspiring story of Chicago legend Ron Santo'. With a clear and passionate fan base around the baseball club itself as a starting point, this film too targeted sport and health interest groups to expand its potential audience (sport, health issue, geographic region (<http://www.thisoldcub.com/index.htm>). As of October 2007 it had sold DVDs worth a \$US1 million through its website, with a further direct distribution of 70,000 titles (SPAA Fringe, Sydney, November 2007);
- *Brats* – "The first documentary about growing up military". The producers went around screening it near military bases, selling DVDs directly after screening and using sms as a key word-of-mouth tool (<http://www.bratsourjourneyhome.com/>);
- *One Six Right* a beautifully shot film about aviation is the 'plane porn' answer to *Top Gear*'s 'car porn' (<http://www.onesixright.com/>). Flight schools, planespotter, aerodromes and pilot (amateur and professional) networks were the target for this film's advertising.

Using this 'Tupperware party' model for distribution, old and new technologies converge. Events are mediated electronically, you log in and register if you want to host or attend, then audiences and those hosting screenings are matched by zip code. Screenings are frequently free with a discussion afterwards—both in the venue and online with producer Q & As. Hosting individuals or bodies can be reimbursed via a guaranteed percentage from each DVD sold from their screening. Many of Broderick's key clients and/or case studies employ what he calls a hybrid approach, using traditional distribution outlets such as theatrical release, TV rights and conventional home video, but also utilising the internet, SMS and other forms of niche marketing to directly reach potential customers.

Is the Future Generic?: Niche Distribution and Genre Content

It's interesting to note the centrality of documentary in many of these examples from the Broderick stable. Clearly at the moment, social networking is considered the viral networking tool *par excellence*, and film producers would be foolhardy not to acknowledge this. Clear too is the potential value of online distribution and funding models. But these still rely upon either a pre-existing market or the promise of one – so how does Australian content compete on this global terrain? Do US audiences really care for our documentaries, especially if they are focussed on local histories and personal stories? Some Australian-produced documentaries are finding an audience employing these kinds of techniques, albeit for productions of international focus and significance, rather than ones specifically telling local stories. The stand-out example of this is Dee McLachlin's *The Jammed*, a film about human trafficking, which was picked up for niche distribution by producer John Simpson after he saw it at the Dungog Film Festival (Bodey 2008). After securing a small release for the film at Melbourne's Cinema Nova, *The Jammed* took off:

What made the difference was targeted, niche marketing. Working out who your audience was and hunting them down and giving what they wanted, or appearing to,” [Simpson] says with a laugh. It worked, with human rights organisations taking up the cause and Simpson’s lateral thought to ask religious groups “to bear witness” to the film’s tale of modern slavery also attracting large groups to screenings. (Bodey 2008)

Festival and limited screenings appear to be central to the Australian unfolding of these kinds of niche network marketing strategies. Australian Film Syndicate, a new local film distribution business set up by local producers employing these lines of attack themselves, see them as key as they “target community, regional and independent cinemas and rely on positive reviews, word of mouth and affirmation from local festival screenings or selection” (Bodey 2008). Geoff Harrison’s DVD distribution company Umbrella has a slightly longer history of success using communities of interest to generate income around the re-release on DVD of Australian films (Screen Hub 2007a). But unfortunately the hand that feeds can also bite back: the open networks that enable new audience development and distribution possibilities are notoriously hard to control, as the people behind *The Jammed* found out when they discovered 20,000 downloads of a bootleg copy of the film from a pirating website (Bodey 2008). We will return to the genre question later in this paper.

Infrastructure Challenges and Consumer Uptake

For Australian producers there are other drawbacks to the ‘long tail’ distribution model. ‘Long tail distribution’ in Anderson’s vision is the possibility of ongoing sales of content to niche markets through a variety of non-traditional platforms. For professional producers there are at least three ‘long tail’ distribution options:

1. Online and mobile niche marketing of content originally produced for traditional platforms (film and television) in traditional formats (eg full length features, TV dramas and soaps, television and feature length documentaries);
2. Online and mobile niche distribution of content which is more or less traditional in style and format but produced specifically for online and mobile media;
3. Niche distribution of non-traditional content produced in new formats for new platforms (online and mobile screens)

Each of these three models raises different issues to be overcome in the specific conditions of the Australian marketplace.

For many producers of traditional content the first model of long tail distribution is potentially a profitable option, offering the possibility of ongoing recoupment from a catalogue of existing and current productions. Certainly, this possibility seems more feasible than option two where there are some significant infrastructure issues to be overcome before the possibilities can be fully realised. Traditional long form film and television content can be streamed or downloaded online provided sufficient bandwidth is available, and to mobile devices if viewers have mobile devices with sufficient memory and battery power. None of these can be assumed, even in developed countries like Australia, where recent research undertaken by the authors suggests that bandwidth and cost are still major factors preventing user uptake amongst young people. The same research suggests that young people in Australia, unlike those in Korea and Japan, are still reluctant to watch long form content on mobile screens when they could more comfortably watch the same content on large screens, which points to these modes as best mobilised as advertising, not platform delivery, mechanisms as per the Broderick approach.

Reflecting the slow uptake of long form content online and on mobile devices amongst young people, there has been surprisingly little cross-platform activity in the Australian screen production industry, with screen content producers still to some extent siloed according to format and delivery platform. A variety of problems may be contributing to this reluctance, from IP considerations to narrow bandwidth and conservative attitudes. IP and rights issues may be lurking within production and distribution agreements signed before new models of distribution became available, and Australia is still well down the league in terms of bandwidth and delivery speed.

Finally, in an exceptionally risk-laden business where no more than one in ten Hollywood films breaks even (Harris 2007), traditional producers are understandably shy of taking further risks in uncharted waters. Last year's Screen Producers' Association of Australia (SPAA) conference focused on presentations designed to tease out issues which may inhibit Australian producers from engaging with new media (SPAA website for 2007 conference). On the up-side however, evolving marketing requirements mean that producers are increasingly required to deliver and distribute content in new formats and platforms. The need for trailers, promos and teasers for film and television content for distribution on mobile devices and online, associated fanzines, games, additional content on websites and the increasing use of targeted DVD marketing and distribution to niche market segments (using a mixture of traditional and new media-enabled networks) means that producers are becoming more and more familiar with the techniques of digital distribution.

Digital Distribution and Market Critical Mass: The Challenge for the Australian Industry

For professional producers, a move to sole reliance on niche marketing as in the second point above is likely to entail a radical shift in production financing. Making a film is an expensive business, even a short film using digital technology. For example, the 23min. Australian claymation *Harvie Krumpet* which won an Oscar for Best Animated Short Film in 2003 cost \$377k to produce five years ago (Coombs 2008). Australian screen producers have traditionally used pre-sales to finance production, but whereas in America it has (until recently) been the case that all but the most expensive productions could be fully financed out of the domestic market, the small size of the Australian domestic market, and a lack of tax incentives for private sector investors, means that Australian producers are also reliant on an element of government subsidy. The Australian government funding model is currently undergoing an overhaul, and the new Screen Australia recently released its draft funding guidelines (http://www.screenaustralia.gov.au/new_directions/DPG/DPG_comminindex.asp). Responses from the industry indicate an ongoing expectation of financial assistance to the short filmmaker as a prelude to making feature films and TV drama, as in the following example:

The history of Australian film and TV shows us that filmmakers do not move to long form projects without at least one great well-funded short project behind them. The common exception in this area is the (almost exclusively) nice white middle class boys who work in Advertising. If Screen Australia is genuine about fostering diversity it MUST recognise that these short film programs are an essential part of the development of film makers who don't work in Ad-land. (Coombs 2008)

Without pre-sales or government subsidy, producers must rely on private sector investment (hard to raise in Australia since the demise of the 150% 10BA tax rebate in 1989) or credit card finance (viz *Four Eyed Monsters*), but it is sometimes forgotten that even the 'credit card film' producer requires significant financial resources to obtain credit and pay the ongoing interest. The implication of Coombs' response is that work in advertising not only provides filmmakers with experience in short form production but also allows them to build a healthy bank balance with which to finance the move to long form production and, if necessary, the credit card film. A small

domestic market may also have implications for the third long tail distribution model. Broderick without doubt is onto something paradigm changing here, something the SPAA Fringe audience is fortunate to hear him share, and we are patently seeing a shift away from traditional gatekeepers, towards newer and decentralised aggregating mechanisms (just look at the music industry), but can OZ content compete? Most of Broderick's customers are US based, and one of the key advantages they possess which Australian producers do not, is a much larger market overall; 1% of 330 million may put food on your table, 1% of 21 million barely keeps you in batteries.

Coombs response on the Screen Australia website to the release of the amalgamated organisation's 'New Directions' draft funding documents also raises the issue of Australian culture and the role of a national film industry. She argues that "our industry is one of the whitest, most middle class industries in the country", and asks: "are we really telling representatively Australian stories?" (Coombs 2008). Reinforcing this point, fellow Australian producer Steve Maccagnan as part of the same online discussion observes: "what does the future hold? More boring out-of-date stories, told in the traditional way with huge, fat filled budgets? God help us all" (Maccagnan 2008). Bringing the point home, Ian Brown is exasperated at Screen Australia's draft guideline requirement for Australian films to have 'cultural merit', and his comments are worth quoting at length:

Having gone through the [Screen Australia] documents, I am left in absolute despair of the continual mantra stating that projects must have 'cultural merit'. This is, and has absolutely proven to be, the single most ineffective and self-destructive directive in the whole of the industry and it simply *does not work*. ...No-one – [not] even the best of our cultural ambassadors - is able to adequately define what Australian Culture is, and to have this as a quantifiable measure in a document such as this is head-smackingly useless.

Take a moment, lean back, and describe what 'Australian culture' is in less than a paragraph. Expecting a [government agency] to evaluate dozens of projects with this as a directive simply won't work - just as it hasn't worked for many years. ...it almost always backfires and ruins many, potentially interesting projects.

Let's say a creative team has a good idea. They want funding. They think they don't have enough 'culturally relevant' material in the project. So they put some in. But it's fake, *ersatz* Australian culture. It's not organic to the project. It's what producers are thinking is Australian culture to get their projects past the gatekeepers. It's probably the single biggest reason there are so many detestable social-realist films in our output, so many larrikin comedies, all trying to be 'culturally relevant'.

I'm reminded of certain tribes in New Guinea. Tourists pay to come out to see them in their huts, using their stone tools. As soon as the tourist Land Rovers disappear over the hill they put on their Hawaiian shirts and get back to their iPods. The point is that it's all a fake, their real 'culture' is whatever they happen to be doing at the time. This is what 'culture' means. ... If an Australian makes a film, *whatever it's subject matter*, then it is - by definition - Australian Culture. (Brown 2008)

Weaving another important strand into the complex relationship between the old guard and the new, a number of people have commented on Screen Australia's guideline requiring 'inexperienced' producers to attach 'experienced' producers with feature film credits to their applications for funding. Melanie Coombs, acknowledging that the traditional film vs. television, drama vs. documentary silos are beginning to break down, asks:

Who are these Experienced Producers? ...there needs to be an acknowledgement that Experienced Producers often work across genres... If these 'cross genre credits' are not

accepted then companies that have cleverly diversified their production slate making shorts and documentaries and television drama building towards feature film making (for example) are being punished not rewarded for their 'enterprise'. (Coombs 2008)

But producer Steve Maccagnan tars all 'experienced producers' with the same fat cat brush:

It's no surprise that the draft guidelines have come out in favour of the anointed few, as they were the only ones that were offered an opportunity to be part of the consultation process. They (the so called experienced producers) have been very vocal over the past few years about the need to reduce the numbers of filmmakers that got access to funding – congratulations – you've won. ...Finally, what is the true definition of a screen credit? Is it 100,000 hits on your Youtube channel? Or is it 10,000 DVDs sold from your website? (Maccagnan 2008)

And bringing the argument full circle, Maccagnan supports his comments with a quote from Peter Broderick's website:

Many of the rulers of the Old World continue to look backwards. Having spent their entire careers in this realm, played by its rules and succeeded, they can't see past the limits of their experience. For them, the Old World is the known world, which they refer to as "the film business." They explain away the serious problems facing the Old World by citing the film glut, higher marketing costs, mediocre films, and the historically cyclical nature of the industry. They appear to believe that everything will be just fine with enough discipline and patience—if fewer, better films are made, costs are controlled, and they can hold out until the next upturn. (Maccagnan 2008)

Certainly one of the logical things we're likely to see emerge in terms of non-amateur production in all of this, is a greater recognition of the importance of fitting in with international genre expectations, be they high-end or niche. Further, and interestingly, we think access to global networks of distribution and content is having some specific local effects on the Local product itself; indeed upon the very notion of what constitutes Australian content. One of the key changes occurring at the viewer level, and hence with clear implications for production, is the increasing evidence base that local audiences are less concerned with where a text was made, and more with its genre; for example, a recent report commissioned found that an Australian comedy was seen as a comedy first and foremost (Prior 2008). Australian films, meanwhile, were identified, especially by younger audience members, as 'something they show at school', ie. worthy rather than sexy (Prior 2008).

The key reason for this shift to genre is precisely the way in which material travels online and/or virally (especially an issue for niche content). Though clearly operating on different distribution levels, what unites both the big and smaller ends of town is the breaking down of access to film production and distribution, and the reliance of both on an audience increasingly bringing changed expectations in regards to immersion, interactivity, authenticity and production values. As we learn to navigate the long tail, not only new aggregators but new identifications of the kind of content we desire are operationalised. While high-end Australian content such as Baz Luhrman's *Australia*, can afford to offer a hyperreal vision of national identity, in the smaller niche spaces of the internet it is self-identification, especially as exemplified by the Broderick approach, which the audience seeks out and latches onto. To compete in this environment, a focus on genre over and above all else offers the greatest chance of international success. Therefore, perhaps the central question underpinning this paper needs to be re-written: it is not so much: 'can Australian film benefit from the long tail?' But rather, 'what will Australian film become as a result of shifting distribution mechanisms, and the audience expectations they engender?' This situation is exacerbated,

ironically, by the success of Australian talent—behind, in front of and post-producing—the screen. Unlike the case in the 1970s, we are no longer an embryonic, exploratory, inward-looking national industry engaged in a nation-building project, but rather a vital part of the Hollywood production chain. So what we see happening at the moment, at least at the smaller end of town, are local producers of genre film reaping the benefits of niche markets. Queensland University of Technology PhD researcher Mark David Ryan is presently researching the huge growth in Australian horror films. With Australian horror film production—mostly low budget—trebling in the past eight years, “Like the undead from the grave, Australian horror films are alive and well”, (Ryan quoted in AAP 2008).

In a market like the US there are all sorts of interesting new possibilities enabled by user-generated content sites, the desire for networked online communities and the potential of decentralised long tail distribution. Thus the question remains: will this only work for US content as there’s a bigger local market? Many of these approaches, especially the niche audience/Tupperware) approaches, rely upon economies of scale for a meaningful return which simply don’t exist as they do in the US. When asked this question at SPAA Fringe, Broderick points to Byron Bay’s Evolve Media, and its focus on interactive content and direct to market sales. While taking nothing away from Evolve Media and their Screenshop, it’s obvious that the content available here has lower production values, and less financing to support it, than the US examples Broderick champions. This poses the further question: will the long tail ultimately still benefit the hits? as people seek out the content they know? Certainly there is evidence emerging around video sales which demonstrates a significant growth in the amount of material now available via the long tail which is either not accessed/bought at all or only negligibly (Elberse and Oberholzer-Gee 2007).

Endnotes

1. For example: www.atomfilms.com

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