

High Risk, Strong Belief

Images of the Future in the Media Industry

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Abstract

When planning for the future, media managers must balance realism with the need to foresee unexpected changes. This article investigates images of the future in the Norwegian media industry in the early years of the 21st century and identifies five key trends that media managers envisioned: *personalized content*, *user-generated content*, *rich media*, *cross-platform media*, and *mobility*. We argue that increased reflection on such visions and how they are formed may put managers (and researchers) in a better position to meet the future. We therefore ask to what degree they were influenced by actual developments at the time, or anchored in more classical imagery of the future. The analysis illustrates how new technologies become focal points for articulating old dreams about the future. At the latest turn of the century, the mobile phone served as such a focal technology.

Keywords: scenarios, personalization, user-generated content, rich media, cross-platform, mobility, focal technology

Introduction: Needing a Roadmap

In order to make strategic decisions, managers need to develop a vision of the future. Although they can neither accurately predict nor control the future, their image of what the future brings impacts on investments and what they direct their attention to. Thus far, studies of strategy-making in media enterprises have paid little attention to such visions. In the present article, we report from interviews with 45 media executives in 2004/2005, using these to identify the visions of the future that circulated among Norwegian media managers in the early years of the 21st century.

Five shared visions of the future are identified in the interviews: *personalized content*, *user-generated content*, *rich media*, *cross-platform media*, and *mobility*. Because visions of this nature are used as guidelines for strategic planning and investments, it is important to reflect on how they are shaped, what their limitations are, and how they can be improved to better serve their strategic purpose.

The overarching argument of the article is that, when developing visions about the future, media managers must balance realism with the need to be innovative and foresee unexpected changes. This is truly difficult, but increased reflection on how visions are shaped and what their strengths and weaknesses are should put managers in a better position to use visions fruitfully in organizational planning. One key question addressed

here is to what degree the managers' visions were influenced by actual developments at the time, or to what degree they were anchored in long-term classical imagery of the future.

A key finding is that new technologies become new focal points for articulating old dreams about the future. The mobile phone became such a focal technology around the latest turn of the century. Seeing the future through lenses of a focal technology such as the mobile phone, however, may lead to overemphasis of the capabilities of this technology, distracting attention from other viable technologies, content developments and user patterns.

Uncertain Futures

Technological shifts and developments in far-away markets and transnational regulatory bodies bring abrupt and unexpected change in most industries, including the media. This has caused the common time frame for strategic planning to shrink to 3-5 years (Hagemann 1997: 145). Several methods are used to predict the future, the most common being *forecasting*. Its key element is environmental scanning, "the monitoring, evaluating and disseminating of information from the external and internal environment" (Hunger and Wheelen 2007: 33). This is often combined with an analysis of the specific industry and methods for situating the individual organization within this larger picture (:33). While being a well-tested tool for avoiding strategic surprises, it has its downsides. It is impossible for any firm to monitor all external factors, and the information gathered often becomes overwhelming (Hunger and Wheelen 2007: 37). Forecasting and environmental scanning can only provide data on trends that are already underway, so unexpected developments are likely to be overlooked.

Clayton Christensen has called this *The Innovator's Dilemma*. Long-term planning, forecasting and customer orientation make management ignore what he terms *disruptive technologies* – technologies that are initially used in fringe markets, but end up outperforming established products in their own mainstream markets (Christensen 1997: xxiii). Christensen refers, for example, to the emergence of portable computers at a time when all the major players were making large mainframes. Thus, "the logical, competent decisions of management that are critical to the success of their companies are also the reasons why they lose their positions of leadership" (Christensen 1997: xiii).

Media history has shown that no one can know for certain which innovations will lead the way, and what the critical success factors are. There are strong first-mover advantages for those who identify the "next big thing", but great risks for those who move too fast on uncertain ground (Christensen 1997: xxii). According to Küng, many early dot.com failures believed too strongly in first-mover advantages and winner-takes-all effects (Küng 2004: 50-52). They invested heavily, and failed when markets did not respond. This underlines the need for visions of the future that are realistic, yet open to new and disruptive developments.

Managers of competing companies and different media industries share many images of the future. Such visions circulate in trade journals, conventions, conferences, books and news, and are carried from place to place by consultants. Consultancy firms also create scenarios – defined as "focused descriptions of different likely futures" (Hunger and Wheelen 2007: 50) – for individual enterprises (see also Lindgren and Bandhold

2003: 22). Although all businesses seem to look for the one unique business opportunity that is coming from some correct anticipation of some future trend, the similarity of the forecasting methods makes for relatively similar scenarios across competitors and sectors.

How do Media Managers View the Future?

This article analyses the visions of the future held by Norwegian media managers in the early years of the 21st century. It is based on 45 interviews with Norwegian media managers from different media industries.²

We asked how they saw the future 1-2 and 10 years ahead, which are typical time frames for short-term and long-term strategic planning. Writing from a position some four to five years later, these interviews provide interesting data for a short-term historical analysis. It is worth noting that the informants were explicitly asked to be visionary, share their predictions of the future, and relate this to their strategic choices and plans. Such an explicit speculative approach warrants caution in taking the informants statements at face value, for instance, as the main motives behind later strategic choices, business plans and policies. Still, we do believe the statements are valuable indicators of a certain frame of mind at a particular point in time, and signs of the realm of possibility the executives considered when thinking about the future media market.

Several ideas were shared by many or most of the informants. In the analysis of the interviews, we have identified five broader trends across the empirical data: *personalization*, *user-generated content*, *rich media*, *cross-platform media*, and *mobility*. In order to reflect on what has influenced these visions and to what degree they balance a concern for realism with an openness towards innovation and disruptive change, we discuss them both in a short-term and long-term historical perspective. In light of what we know today, we ask first to what degree the short-term predictions have been precise in describing actual developments. Industry data and statistics are used to analyse the status within each of the five areas at the time of writing.

In order to discuss the visions in a longer-term historical perspective, we have also compared and contrasted the trends with earlier futuristic images, ranging from science fiction to consultancy reports. These are not 'representative' visions of the future from different time periods, but useful examples when we discuss how media executives interpret and relate new technological applications to more stable and familiar images of the future.

Trend 1: Personalized Content

When media executives were asked about the short-term future, they expressed a strong belief in an increased *personalization* of the media. They imagined a user who would be less interested in traditional mass media, and more interested in content specifically tailored to his/her own taste. The informants of 2004/2005 believed in developing services in which content would be less universal, more specialized and more relevant to each individual. Here are two examples of how this belief was expressed:

It is important that we can offer something that is tailored to the individual user. I believe in the new trend where people get personalized services to a larger degree,

for example a community of weight watchers facilitated by a newspaper in which everything is about *me*.³

Imagine, for example, an Internet radio channel where the audience using text messaging to choose the music or the topic themselves [...].

The idea that media will become more personalized is presented without hesitation, and indeed, the vision of more personalized media was a good short-term prediction. Every service the executives planned for did not succeed, but personalized services have definitely become popular since our interviews. One example is online services where users may save personalized content and options, such as weather sites predicting the weather exactly where *you* are.

Viewed historically, it appears that the vision of more personalized media is perhaps *the* most persistent in older visions of the future. Historically, there has been a strong distaste for the idea of mass media, spreading its content equally, and without differentiation, to many people. A preference for personal media clearly precedes the development of the mass media, as in the medium described in Edward Bellamy's futuristic novel *Looking Backward*, published in 1888. Bellamy's protagonist finds himself in the year 2000, where the 'music room' – a kind of telephone with music on demand – gives listeners the opportunity to select individually from "the longest programme of music I have ever seen" (Bellamy 1996 [1888]: 54).

Personalized content has been found in sci-fi literature throughout the 20th century. Recent examples include the movie *Minority Report* (2002), where computers in billboards identify shoppers by scanning their retinas, and serve them personalized ads. The same trend has been apparent in business literature and consultancy reports since the late 1980s. In his best-selling *Being Digital*, Nicholas Negroponte expects the mass media to change from pushing bits at people to allowing people to pull at them at will (Negroponte 1995: 84). An example of a late 1990s consultancy report is PriceWaterhouseCoopers' scenario "MECA"⁴ (PwC 1999), where we read that entertainment and media conglomerates will "turn every new form of content into its own unique brand that can appeal to one or many consumers" (PwC 1999: 5).

The idea of individual media is a long-lasting characteristic of media forecasting. It is interesting to note, however, that our informants explicitly linked personalized content with the mobile phone as a personal medium. This is an example of such a statement:

People have a very personal relationship with their mobile phones. This relationship together with more advanced telephones and increased transmission speed creates a multitude of possibilities.

A new technology helps to re-focus and re-articulate an old idea. Where the landline phone was the key technology for Bellamy's 'music room' and the Internet was key for Negroponte's vision of more individualized media use, the mobile phone became the medium embodying the vision of personalization around the turn of the century.

Trend 2: User-Generated Content

The second trend we identified was the explicit belief in "user-generated content". 'I believe user-generated content will get big', one informant stated without hesitation. The executives interviewed believed their audience would be able and willing to provide

content in areas in which they had special knowledge, if they were given opportunities to do so. Two of the informants described the trend as follows:

We wish to develop the possibilities for user-generated content where readers can deliver material to the newspapers' website. We imagine, for instance, that readers' experiences to a larger degree can become part of the travel pages, and that the consumer section can include more readers' views.

Interactivity and user-generated content are maybe the most important strategic areas [...]. The point is to give those who are active more opportunities than just having their text message projected on the TV-screen. Within the next two or three years we will see many more user-produced segments, for example: "here is my car", "here is my boat", "here is my sweetheart", "here is my cat".

Our informants describe users as predominantly *reactive*, providing information and commentary in response to specific invitations from media organizations, such as "add comment" at the end of articles. None of the respondents saw the coming of sites dedicated entirely to the expressions of users, however. Our interviews were conducted before the boom of social network sites, such as *MySpace*, *YouTube* and *Facebook*. While these three sites were online in early versions at the time of most of the interviews, such sites have rocketed in popularity since 2005. Just three years after our interviews, *YouTube*, *MySpace*, *Wikipedia* and *Facebook* were among the ten most visited sites on the Net worldwide, according to *Alexa.com*, while similar sites, such as *Hi5*, *V Kontakte*, *Flickr* and *Friendster* all were in the Top 40 sites. Both social network sites and user-generated content sites build their success on users who contribute their own material, rather than reacting to editorial content produced by professionals.

The idea of user-generated content is less obvious in historical accounts of the future. A striking feature of Negroponte's *Being Digital* (1995), for instance, is that media use remains *consumption*. Apart from e-mail, users are not described as individuals who produce content, participate in production, or generally influence what they are served. In contrast, Bellamy (1996 [1888]) envisioned talented people contributing to the musical concerts broadcast to homes via telephone, and that they might also start their own newspaper. A similar prediction was offered a century later by George Gilder: "Just as digital desktop publishing equipment unleashed thousands of new text publishing companies, so the new digital desktop video publishing systems will unleash thousands of new filmmakers" (Gilder 1990: 204).

Bellamy, Gilder, and others seem to have expected that the public would use new media to produce the same kinds of material as professional media organizations do. Idealists arguing for more democratic media have voiced similar hopes; although they have expected that the content produced by the public would be infinitely *better* and more aimed at raising social and political awareness. Such expectations were raised in Bertholt Brechts's manifesto 'Radio as a Means of Communication' in 1932 (1979), and later in relation to cable television and local radio (Berrigan 1977; Barbrook 1985; Barber 1984), the Internet (Dahlberg 1998) and digital media in general (Coleman 1999; Rakow 1999).

In all these cases, the expectations were raised when the medium was in its infancy. Again we see how the introduction of new media throughout history has acted to re-focus dreams that were already there. The dream of more participatory media is also

old and influenced by the same distaste for mass media as the dream of personalization. However, it has not been easy for visionaries to specify and predict what kind of content the audience would really produce if they had a chance, and which technical vehicle they would use to do it.

Imagination has its boundaries, and predicting the future is usually a case of combining and exaggerating already familiar elements. Although media managers want to be innovative and foresee new developments that break with established patterns, this is difficult. The idea that people would contribute in totally *new* genres, such as sharing more or less trivial information about their own lives, interests, and activities, seems to have been hard to imagine for media managers used to thinking about media content as institutionally produced. With the success of the World Wide Web, however, the character of the predictions changes; media executives become more aware of the creative force of users and the multitude of genres they invent and contribute to. Anyone may publish his own web site at very little cost. This opens up for genres previously not thought of, such as social network sites and items such as “Here is my cat”.

Trend 3: Rich Media

A third trend that emerged from the interviews was a belief in what the interviewees called ‘richer media’ or ‘rich content’. Rich media was a buzzword, typically describing how extra features, including moving images, could be integrated into existing services. Here is an example of how an informant described the enriching of mobile phones:

The telephones are getting more advanced, and the downloading speed is getting better all the time. This makes richer communication possible. Now you can watch television on your mobile and also use it as a return channel.

In 2004, the percentage of households with Internet access in Norway was 66%. In 2007, this had risen to 83%. The number of broadband users in Norway has also grown tremendously, from 29% in 2004 to 72% in 2008 (Statistics Norway 2009: 80). This enables the population at large to receive rich content via computers, and in the years following the interviews, broadcasting houses, online newspapers and other websites launched a variety of audio and video services.

In the same period, the number of users that could access the Internet via their mobile phone has also increased. In 2007, 2.3 million Norwegian consumers bought new mobile phones (Norway’s population is 4.6 million), and 55% of these were 3G phones that could access the high speed (UMTS) network (Elektronikkbransjen 2009). Yet the use of mobile media services is still low and has not risen proportionally. In the period from 2005 to 2007, daily use of mobile media services in Norway grew moderately from 3% to 5% (TNS Gallup 2008).

While the use of rich mobile content is still modest, there are signs that at least audio and still images may become more common on the mobile phone. In 2007, revenues in Norway from music downloads via mobile surpassed revenues from the Internet, according to GGF/IFPI (International Federation of the Phonogram Industry). Also, recent reports indicate that streaming and downloading of rich content are markedly more common on mobile terminals that are especially designed for moving images and web, and that iPhone users are much more likely to watch on-demand video or TV on

their mobile phone than are other users with advanced phones.⁵ This illustrates another difficulty associated with forecasting media developments, i.e. timing. Even if media services are getting richer and this trend may become stronger in the next few years, the development is far behind the expectations of our informants.

The idea of 'rich media' is well entrenched in historical images of the future. At least since the mid-1950s, people have imagined immersive, multimodal technology. In the 1987 television series *Star Trek: Next Generation*, space travellers entertained themselves by literally walking into a fictitious world in the "Holodeck" (Murray 1997). Twenty-five years earlier, Morton Heilig combined wide-angle stereoscopic film, a moving chair, a wind machine and odours in his "Sensorama" prototype, a precursor of the virtual reality research of the 1990s (Rheingold 1992). The way the term rich media is used by our informants shares some aspects of these dreams, in that various features are added to existing formats. This is also similar to the use of the term 'multimedia' in the 1990s. When video clips were added to written material in CD-ROMs in 1995, it was called multimedia (see, e.g., Hughes 2000). In 2005, when audience members were envisioned to upload or download videos and pictures via mobile phones, it was called rich media. It seems that rich media meant 'video or sound on the Web and in mobile phones, especially sent by audience members', or in short: 'video in unusual places'.

One new element of the switch from the term *multimedia* to *rich media* appears to be the emphasis on the *communicative* or *relational* aspect between senders and receivers of multimodal texts. The term *rich media* as used by Norwegian media executives also included the possibility of a large number of audience members communicating with media institutions. To the degree that the belief in richer media, enhanced services and faster networks fosters specific predictions for generic content, we see increased attention being paid to user-generated imagery (cf. trend 2 above), games and game formats, audience voting on broadcasting shows, and gambling.

In our interviews, the improved capacity and speed of mobile communication was the one development that most acutely actualized the idea of richer media. Although executives also envisioned applications where the mobile phone enriched other media, it was the mobile phone that was seen as the most important rich medium. It appears that media industries generally focus their ideas of rich media on the latest technology they believe will become a success. In the period around the latest turn of the century, the mobile phone played this role as the key focal medium.

Trend 4: Cross-Platform Media

The fourth trend we found in our interviews is the belief in cross-platform media. These are media formats designed for several platforms simultaneously. The media managers believed more messages would be transmitted via several different distribution channels. Formats like *Big Brother* and *Pop Idol* had already been tremendous successes at the time of the interviews. Experiments were conducted with new formats such as SMS-TV (cf. Jones 2004; Kjus 2006; Enli 2005; Beyer et al. 2007). Our respondents believed similar strategies would be relevant for everything from news and music to entertainment. A typical statement from our informants read:

You will see cross-over, powerful combinations. ... Much more integration between platforms.

Since the interviews were conducted, many more cross-platform activities have emerged. Formats developed on one platform are increasingly designed to include audience feedback and user-generated content from other platforms (cf. trend 2). In addition to the many radio and television formats that use response facilities through the Web and SMS, platform crossing has become the rule more than the exception also in print and web-based media. Online newspapers, for example, have expanded their web TV content, and receive comments via e-mail, web and SMS/MMS. An increasing number of sites offer the possibility of integrating and sharing content or bookmarks between platforms, such as sharing a web article on another site or blog, or notification via e-mail or SMS.

Adapting genres and stories between different media is an old tradition in the arts as well as in film, radio and television. Nevertheless, while such strategies as cross-promotion, syndication, and spin-offs are old, we would argue that the cross-platform trend is new in the sense that it from the outset is designed to be shared and flow across multiple media platforms, and in many cases only makes sense when consumed via several platforms (cf. Jenkins 2006: 101 ff on transmedia or synergistic storytelling).

Concrete visions of cross-platform media are not abundant in historical images of the future. However, if we widen our conceptions somewhat, we see that what our informants mean when they talk about cross-platform is a variation of the idea of 'convergence'. In the 1970s, the term 'convergence' was used by Negroponte to describe future media developments (Brand 1987), and in the 1980s, Ithiel de Sola Pool described convergence as a process "blurring the lines between media" (de Sola Pool 1987). In the 1990s, convergence became a buzzword not only used by technologist, but by policy-makers, media executives and media researchers (Storsul and Stuedahl 2007). Convergence was used to describe the blurring of boundaries between different networks, terminals, markets, services, rhetorical modes as well as regulatory regimes (Fagerfjord and Storsul 2007). Thus, in the case of cross-platform media, it again appears that one key term has replaced another (cf. rich media and multimedia above). Interestingly, only two informants explicitly mentioned the once so popular buzzword 'convergence'.

A classic example of the historic view of the convergent medium is George Orwell's dystopic novel *Nineteen Eighty-Four* (Orwell 1949), where giant telescreens are placed in strategic places and function both as televisions and as surveillance cameras. In 2004/2005, the term 'cross-platform' represented a shift in how converging media were viewed in practice. "Cross-over" and "cross-platform" did not describe convergence in the sense of different services integrating into one terminal. Rather it is perceived as the combination of media formats that integrate services from different technological platforms, e.g., TV and mobile phones.

Have technological developments promoted this shift in perception? Despite what is said above about the mobile phone being perceived as *the* rich medium that integrates many different services, it appears that the proliferation of distribution technologies has weakened the belief in one singular convergent medium. Instead, we see a belief in a more de-centred media landscape where new modes of communication are constructed from a multitude of cross-platform combinations. This illustrates how visions are informed by actual developments and become more realistic.

Trend 5: Mobile Media

The fifth trend emphasized by executives across all sectors was the importance of mobile phones and mobile media. They expected high future revenues from mobile media, often from economic models in which the mobile phone would be used as a return channel (Sundet 2007). Two of the informants formulated their views as following:

The most important strategic area is really 3G and mobile television, because the willingness to pay is great and revenues might be substantial.

Especially the mobile phone as a return channel will play a more important role in the future. The phone will be totally different from what it is today; UMTS and play-along on the mobile while a programme is shown.

It is no surprise that executives in the mobile phone industry believed strongly in the future of mobile telephony. But mobile telephony and mobile phone features were the only technology mentioned *across* sectors, and by almost all of the informants.

After the interviews were performed, Norwegian mobile phone ownership increased from 90% of the population in 2004 to 96% in 2008 (Statistics Norway 2009: 80). Daily use of the mobile phone also increased markedly: People who used it for private conversations (i.e., not work related) on a daily basis increased from 58% to 70%, and the use of SMS from 50% to 61% (Statistics Norway 2009: 67). The mobile phone became a medium which for most belonged to the 'infrastructure' of everyday life (Star and Ruhleder 1996), as it was embedded in various social structures of everyday life, learned as part of membership of a community of practice, transparent in use, and taken for granted to such an extent that it is only visible upon breakdown (cf. Livingstone 2002).

We have found few visions of mobile media use in our readings of older scenarios. Science fiction stories have envisioned mobile hand-held devices for speech, and there have been mentions of radio and music listening on the go (cf. Bull 2000). Earlier mobile media have first and foremost been 'non-electronic' (e.g., books, newspapers), with mobile television screens and portable radios as exceptions. George Gilder, who wrote *Life After Television* (1990), is one of few early writers with a wide popular reach to predict the centrality of the mobile phone.⁶ Gilder's description of the future of mobile phones is interesting, although premature:

... the most common personal computer of the next decade will be a digital cellular phone. ... they will be as portable as a watch and as personal as a wallet; they will recognize speech and navigate streets, open the door and start the car, collect the mail and the news and the paycheck, connecting to thousands of databases of all kinds. (Gilder 1990: 20)

While some of these uses are indeed still marginal, Gilder's points about portability and being as 'personal as a wallet' were later echoed by the media executives. Many media executives saw an economic opportunity in the mobile phone that never occurred with the Web in the mid-1990s. With the mobile phone, use could be linked to an individual already used to paying for a subscription and activities such as text messages and web access (cf. also Beyer et al. 2007). Prospects of new sources of income are always intriguing for media managers. Visions of the future that combine the innovative with expectations about profitability are of particular interest. Hence, the incentive for devel-

oping cross-platform services, personalized content and rich media for the mobile phone were certainly in place and on top of the minds of various decision-makers in the media in 2005. Mobile media were seen as *the* major trend, reinforcing the other trends.

Looking Forward Through Focal Technology

Most of the five future trends we found are long-lasting visions. Writers who, like Negroponte, would like less mass communication and more personal media had long envisioned increased personalization. The ideas that we would see more *cross-platform* media formats and *rich media* were, as argued, developments of earlier visions of convergence and multimedia.

At the same time, media executives were aware of new developments and innovations. Their focus on *mobile media services* and increased participation in the media through *user-generated content* was based on developments in the last few years before our interviews. *Mobility* was already the most prominent buzzword across the various industry sectors of our informants. In this section, we argue that the mobile phone thus functioned as a *focal technology*, in the sense of a lens used to focus on the other trends and media developments. In the concluding section, we discuss how looking at the future through such a lens may affect the balance between realism and preparing for innovation and unexpected developments.

Mobility appeared as a *new* trend in our 2005 interviews; only a decade earlier, media scenarios did not discuss mobility. In a larger perspective, however, mobility is nothing new. Books and newspapers have travelled with their readers for centuries, and with the increased communications of the 19th and 20th centuries, every popular medium has been made portable. Radio has been mobile since the invention of transistors, and today, commuters are the largest group of listeners. When Sony introduced the Walkman in 1978, it changed the music listening habits of people all over the world.

As the basic technique in forecasting is to select a current trend and project it into the future, we may very well ask why mobility was *not* part of industry scenarios earlier? This question may teach us something about scenario-building logic.

First, there may have seemed to be little development left to predict. Print media had been mobile for centuries and electronic media for decades. Newspapers and radios could hardly be more mobile than they already were. Most media industries were thinking mobile already.

Second, it may have been hard to see mobility as a trend for the future in an era when *television* was the dominant medium. Portable TV sets have never been very popular. Most people would prefer a large television screen to a small one, and television is mostly viewed in the comfort of private homes (Williams 1974).

Third, it was arguably the networked multimedia computer that was the focal technology in the 1990s, the new technology that represented change. At the time, most computers sat on desktops connected to the computer network with cords. When Negroponte began talking about *convergence* to describe computer development, he included the publishing industry together with the broadcasting and computer industries, but not the telecommunication industry (Brand 1987). In his own book, Negroponte forecasted that telephone transmission would change from copper wires to radio frequencies, but did not discuss how this might influence media use (Negroponte 1996).

Mobility did not enter media scenarios until a new focal technology appeared, a technology that put the *previous* focal technology, the computer, inside the same box as a telephone with a small screen.

When we consider many of the uses of mobile phones suggested by the informants in our interviews, it becomes clear that the phone was imagined as a coming "über-box", a collection of all media technologies in one mobile device (Fagerjord 2001). Still, the use of other mobile services than calling and texting has been limited so far. *User-generated content*, on the other hand, has become very popular in the form of websites like *YouTube* and *Facebook*.

User-generated content was not a theme present in the mid-1990s. Negroponte (1995) saw the audience as consumers of contents produced by professional media firms. The 1999 PwC report believed audience members would gradually become more active. This belief was shared by the interviewed executives, but their faith in mobile phones was even stronger. It becomes clear that strong belief in a focal technology may run the risk of pushing other technologies or usage patterns out of view. How does this affect the media managers' ability to balance between realism and preparing for innovation?

Conclusion

The map of the future held by the Norwegian media executives in 2005 strongly resembled the map designed in the 1990s. In the mid-1990s, media executives were searching for profitable Internet strategies. Around 2005, some viable business models for the Internet market were in place, and although there still were major uncertainties, the Internet was no longer an unexplored area. The area without a detailed map at the time of the interviews was the mobile media market. The mobile phone was seen as the technology most likely to change the balance of the industry, the technology to invest in and not to be left behind.

We find a striking lack of critical voices as all rushed towards the same conclusion. The informants seem to have believed everyone was already motivated to use new mobile services; as soon the technological solutions were simple, feasible and affordable, people would certainly use them. Earlier scenarios have also taken audience motivation for granted. In its MECA scenario, PwC never considered whether users in fact would want to enter the imagined media/entertainment mall. Negroponte is quite typical in sounding a technology determinist note:

Like a force of nature, the digital age cannot be denied or stopped. It has four very powerful qualities that will result in its ultimate triumph: decentralizing, globalizing, harmonizing, and empowering. [...] Digital technology can be a natural force drawing people into greater world harmony. (Negroponte 1995: 229-230)

Still, history has shown us that lack of user interest is a force stronger than many technological inventions. One of the reasons why the Internet market crashed in 2000 was the heavy investment in services that people did not actually use or pay for (Godø 2003).

Thus, as we have argued, in order to plan ahead, media managers need to develop a vision of the future. Finding the right balance between making a map that is realistic and builds on experience, yet is open to innovative ideas and disruptive technologies, is difficult. It is difficult to foresee what will happen, which technologies and services

people will use, and when new markets will develop. The present study, however, does indicate certain elements important to consider when thinking more realistically about an unknown future.

First, futuristic scenarios should be seen in relation to earlier scenarios. Analysing the new visions from the perspective of former scenarios and long-lasting ideas about media development may contribute to a better understanding of what contributes to change, and how current scenarios should be interpreted.

Second, focal technologies change throughout history, and shed light on some features and uses, while over-shadowing others. A strong focus on a specific technology is likely to bias a prediction in favour of its features, and often leaves little room to consider the needs of the audience.

Third, rather than focusing primarily on a given technology, the media industry should always keep the *users* in close focus. Users will not use new media or services just because they are new and available. Established media have certain features that have made them attractive and constitute a force of stability often ignored in futuristic visions. Our analysis illustrates how new technology and services are sometimes not adapted by the users, or adapted later than expected, and sometimes used in unexpected ways. The future behaviour of users is hard to predict, but nevertheless, we will argue that investigating user behaviour and learning from past experiences of media change reduces the risks involved.

This does not mean that new developments will always build incrementally on old experience and that it is always best to play it safe. Christensen (1997) has shown that companies that build logically on past experiences may be left behind when disruptive technologies outperform established products. Brave and speculative ideas are important in the media industry, but one should be cautious when the whole industry shares the same speculative ideas.

These lessons also apply to media research. There is a great demand for research that can help managers make strategic decisions for the future. Researchers are often asked to be speculative and “look into the crystal ball”. The more radical and spectacular a forecast is, the more likely it is to be widely quoted. Both in media research and media industries, brave scenarios and fresh ideas are important and contribute to a better understanding of both the past and the future. Brave speculation should always be balanced with awareness of old ideas, and reflection on the role of focal technology and historical evidence of audience demand. Looking into the future is as much about knowing about the past as about the present.

Notes

1. Authors are listed in alphabetical order.
2. Six interviews were conducted during the fall of 2004 and 39 during the spring of 2005. The executives were from: radio (4 informants), television (15), broadcasting related services (6), television production companies (8), online newspapers (9), and mobile telephony (3). Several earlier studies have been published on the basis of these interviews: Sundet (2007), Maasø et al. (2007), Sundet and Ytreberg, (2009).

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3. Names and affiliation of the informants are edited out, as our main focus is on general trends across sectors. Quotes were translated from the Norwegian by the authors. Further details on the interviews are reported in Maasø et al. (2007).
4. Mall for Entertainment/Media Content Access.
5. According to measurements by M:metrics for January 2008. (cf. <http://bit.ly/4vKIEu>, visited August 10, 2009).
6. Interestingly, several other writers predicting future media use writing at (roughly) the same time, such as Negroponte (1995) and the PriceWaterhouseCoopers (1999), did not predict mobility as a major trend.

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