

the two solitudes journal

Exploring the convergence and collision of traditional and new media

Volume 1, Issue 3

The Two Solitudes Journal

November 2006

Will new media mean the end of physical media?

Media... now there's a confusing word. We use it in so many different ways. There's 'the media', commonly used to mean the so-called mainstream media (or MSM) — that is, TV, newspapers, radio and the like. There's 'new media', which we often use to loosely describe the Internet and content in digital forms. There's 'digital media' which, to some, is the world of digitally-encoded audio and/or video content while to others it's storage media like Compact Flash or Secure Digital cards.

But media is also used in the context of 'physical media' and that can range from a hard-copy book, newspaper or magazine to a piece of polycarbonate pressed to create a CD or DVD. And let's not forget vinyl, 8-tracks and cassettes. Anyway, it's the long-term future of this latter usage of the word that may be in doubt. Physical media has built-in obsolescence. Just ask the guy with the basement full of 45's.

Many people still have a library of recorded music on vinyl, but how often does it get used? It's just too much of a pain to deal with most of the time. Even the printed book, in most cases, has built-in obsolescence as the paper and binding degrade over time. I recently got rid of a huge quantity of books that I've been packing and unpacking every time I've moved in the last 25 years.

In many cases, the books were ones I might like to read again, but the pages are yellowed, and they've acquired that "old book" smell that is, for many, unpleasant and, for some, guaranteed to trigger for a fit of sneezing.



At first glance, you'd probably conclude that physical media is alive and well and has a rosy future in our world. Our street corners are more cluttered than ever with newspaper boxes, bookstores abound with books, retail shelves are still full of CDs and DVDs (including a whole new generation of high-capacity DVDs), and Internet websites like Amazon.com still flog extensive catalogues of content in these formats.

This might well lead one to conclude that the future for physical media is bright — but I'd challenge that. The writing may be on the wall for 'pre-recorded' physical media, and by pre-recorded I mean printed material too (yes, even

books). Let's face it, it seems these days that everyone from Apple to Amazon is selling content in digital format. That's not just music, or movies, either, but books and magazines, too.

And newspaper publishers, whether free or subscription-based, have been electronically delivering all the news that's fit to print for years now. We have more and more devices all the time that allow us to enjoy digital content.

There are, of course, the ubiquitous MP3 players that have been around for a long time as stand-alone devices. Now MP3 player functionality is popping up in cell phones and on home and car stereos. Many of our mobile devices, whether we call them PDAs or handsets, now support removable storage (typically SD or mini-SD cards, and now even micro-SD cards) that can hold thousands of songs or hours of video content — and that content can be moved from device to device easily, unlike traditional pre-recorded media.

Oh sure, the trusty old CD can be moved from player to player — the same with a DVD — but they are bulky (yes, the venerable 'compact' disc is now considered bulky) and are prone to damage — and they

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NBC makes deep cuts, restructures for a new era of television

Recently, NBC announced 700 job cuts and budget cuts of \$US 750-million. News programming is the main casualty but scripted programming in the 8:00-9:00 PM timeslot is also being reduced significantly in favour of more reality programming and game shows, both of which are cheaper to produce. Here's the analysis I wrote at that time, some of which was quoted in the National Post on Oct. 20th, and which also formed part of what I said in an interview on Report On Business TV on Oct. 23rd:



News

There are so many alternatives to national network news broadcasts today, in the U.S., Canada and around the world, that the announcement that NBC is trimming news operations isn't surprising. Twenty-four hour news operations can deliver content in a more timely fashion than the twice-a-day U.S. network news programs.

And, of course, increasingly, people are turning to the Internet for news. On-line newspapers present breaking news throughout the day, as do the numerous news portals like Yahoo!, Google News and Sympatico. Today, these services offer video content in addition to the traditional textual content, making them

more compelling than ever. And all of these forms of on-line content allow the consumer to choose which stories they do – and do not – wish to explore, unlike the fixed linear format of conventional news programs.

Syndication technologies like RSS and ATOM allow Internet users to subscribe to news feeds on subjects that are of specific interest to them and this allows them not only to filter the content to that which is potentially of interest to them but also to be exposed to a much greater number of stories than can be covered in a conventional news program.

The result is that audiences can be well informed throughout the day without needing to wait for a scheduled news program. The loss of the iconic anchors for the U.S. network news programs – across all of the big three networks – has probably led to a loss of viewers who tuned in, almost out of habit, to hear the news from a familiar and trusted face. News is becoming commoditized and it's hard to make a decent profit on commodity items.

Scripted programming

Content consumers today have many more choices than ever before. The world that existed when David Sarnoff created NBC is long gone, as are the days when specialty channels (the so-called cable channels in the U.S.) represented only a minor viewership drain for the big networks. Today's broadcast television world is highly fragmented, and that fragmentation is increas-

ing dramatically through the alternate delivery channels of the Internet and mobile TV. But the Internet and mobile TV offer more than just an alternate way to watch conventional television content.

More and more, we're seeing content designed specifically for the Internet or for mobile consumption, and user-generated content on sites such as MySpace and YouTube is increasingly finding an audience. Advertisers haven't missed this, and, although advertising spend across all media grew last year, nowhere was that growth greater than on the Internet – and nowhere was that growth weaker than in conventional television advertising.

Scripted comedies and dramas are very expensive to produce, but they are also very expensive to launch, and few that do make it to air survive. By comparison, reality programming and game shows are cheap and they are therefore more profitable for the networks to run – and there's clearly an audience appetite for these.

NBC, and in Canada, Global, have had considerable success with the game show *Deal Or No Deal* this year. In the past, *Who Wants To Be A Millionaire* was a runaway success – even though network greed led to overexposure that ultimately killed it before its time. And, of course, *Survivor* continues to demonstrate the popularity of reality programming. Thus it isn't at all surprising that Jeff Zucker says he will focus on cheaper programming.

With increased availability of Video

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Really Simple Syndication for video content

By Sean Crawford

With the recent acquisition of YouTube by Google causing quite a stir, many are trying to figure out what the next big thing will be in the world of online video. Ironically, it may very well be a technology that has been in use, in one way or another, for almost 10 years.

Really Simple Syndication, better known as RSS, allows viewers to subscribe to content that is then delivered automatically to their computer whenever it becomes available. That content can be anything from websites and blogs to podcasts and, now, even video. In its earliest incarnations, RSS acted as an agent that would scour websites and blogs, looking for new content and delivering that text-based content to the user. Now that paradigm has been extended to video content, making RSS the de-facto standard for video syndication on the web.

Syndication in this sense is very akin to the delivery of your favourite monthly magazine. However, instead of waiting for delivery by Canada Post, the consumer's computer runs an RSS aggregator that checks for new content on the viewer's behalf and downloads it as soon as it becomes available. In addition to gathering content, these applications often include a built-in viewer with play, pause, stop, fast forward, rewind controls and some additional controls that allow you to rate and manage your content to make the experience complete.

There are many popular RSS aggre-

gation programs, but by far the best known is Apple's iTunes. Other programs, such as FireAnt and Democracy, offer hundreds of channels to which a consumer may subscribe, although currently most of the available content would be considered niche programming and can range from the bizarre to the downright unwatchable. That being said, there is certainly some very decent content out there that keeps their hundreds of thousands of fans coming back for more. Not surprisingly, given the nature of the early adopter, some of the better and more successful content tends to be 'geeky' in nature. Examples include programming offered up by the



likes of Revision3 and Ziff Davis. In the case of *FireAnt* and *Democracy*, most of the programming is licensed under creative commons license, making it freely available to anyone. Content creators that take the creative commons licensing approach offer their content at no charge, and usually attempt to recoup their production costs using the conventional broadcast world practices of pre-roll, post-roll, interstitial and sponsorship advertising.

Apple's iTunes store provides a gateway to mainstream television content, having inked deals with most of the major networks in North America. Access to mainstream content is key to Apple's success, and so, too, is ease of use.

For video-seeking consumers, the iTunes store provides users with the same recommendation and 1-click tools that work so well for customers of their on-line music store. This greatly simplifies the process of finding and acquiring new content.

Arguably, this simplified user experience has had a significant impact on the adoption of audio podcasts and will likely do the same for video. In addition to 1-click purchasing and recommendations, Apple also uses RSS to enable a "season's pass" to popular shows like *The Daily Show* and *The Office*. When a new episode becomes available, iTunes will automatically download it and add it to your library. If you have a video-capable iPod, iTunes will even re-format the content for your iPod, allowing you to literally 'take the show on the road.'

iTunes has not limited the content to that which comes from mainstream producers and networks. You can tune into video podcast content from a vast array of sources. This non-mainstream fare is even listed with the mainstream content in Apple's podcast directory, blurring the distinction between the two. Now your season's pass to *The Daily Show* can exist along side your season's pass for *DLTV* from Ziff Davis.

The only catch is that that Apple currently only allows mainstream producers to collect payment for their content. A change in this policy allowing anyone to charge for

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Video On Demand – The End of Television As We Know It?

For viewers who long for full control over their viewing experience, Video On Demand (or VOD) may mean just that. It may also mean the death of the Personal Video Recorders (or PVR). PVRs, a powerful replacement for VCRs in the home, have seen slow consumer adoption (about 6% in Canada and about 12% in the U.S.) and, when the consumer has access to a robust VOD offering, they may find their expensive PVRs unnecessary. Time-shifting and convenience are the big advantages of the PVR – and VOD offers all of that... and more. DVD rentals continue to be popular because they give the consumer greater content choice, but VOD may make that a thing of the past soon, too.

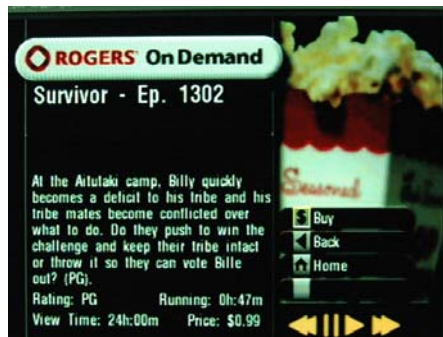
The term VOD is used in many ways. VOD is sometimes used to refer to Pay-Per-View offerings (PPV), but this is a weak positioning of VOD given that most PPV is limited to a small set of programs that start at pre-determined times (usually on the half hour).

Another way the VOD term is used is with Near Video On Demand (or NVOD). With NVOD, a program will have multiple staggered start times, perhaps every 10 or 15 minutes. Although with NVOD the consumer doesn't have to wait too long, it's still not truly an on-demand experience, and the choice of content is still quite limited. But true VOD is just that: video that begins, on demand, within a matter of seconds of the request from the viewer.

Doing true on-demand requires a dedicated video stream for each

consumer of the content – and that takes a lot of bandwidth. Both NVOD and PPV allow multiple viewers to share the same stream and therefore reduce the bandwidth requirement considerably.

VOD will change the way we think of



the familiar program schedule. No longer is it just the case that Survivor is *on* at a specific day and time – rather, we'll think in terms of a new episode of Survivor becoming *available* at that time.

Broadband-based TV networks offer the VOD experience, too. The big Canadian networks all have broadband sites carrying recent content and the CBC has also made a vast amount of their archival material available online.

Cable operators are announcing new on-demand deals all the time, and while their technologies are sometimes a bit lacking, improvements are on the horizon. And telco-TV (TV service delivered over traditional telephone lines) offers on-demand content, too.

But you won't get anything close to full-blown VOD from a satellite dish due to signal capacity limits. And while VOD will increasingly be a strong

differentiator for cable and telco-TV, in areas where digital cable doesn't go, or where the phone network isn't up to snuff to carry IPTV, viewers will continue to turn to satellite for the foreseeable future. For the demanding consumer, though, who does have the choice, the rich offerings of the on-demand world may provide a strong temptation to "ditch the dish".

As more and more content becomes available at the click of a mouse or the touch of a remote-control button, viewers will enjoy a virtually unlimited choice of what to watch at any time. But VOD isn't just good for the consumer. It's also the Holy Grail for cable and IPTV distributors – and advertisers.

VOD presents new ways for operators to make money by charging for the content (either *a la carte* or subscription-based), selling advertising to accompany the content, or both. As well, with an individual stream for the viewer, the operator can tailor advertising to that viewer.

Before that happens, there's still a big hurdle to overcome. The CRTC severely restricts VOD advertising today, but this may well change as a result of the upcoming technology review process.

Content owners, too, stand to benefit in the on-demand world. Consumers can (re-)discover old programs or watch episodes of current programs that they've missed, leading to additional revenue. Over the next couple of years, the evolution of VOD will lead to a revolution in how we watch TV.

A look back at the 2006 International Broadcasting Convention

The International Broadcasting Conference (IBC) in Amsterdam in September attracted a record-setting 44,808 attendees from over 120 countries. Throughout the 5-day conference, and on the show floor, which featured over 1,000 exhibitors, attendees were bombarded with the sights and sounds of new technology and new media.

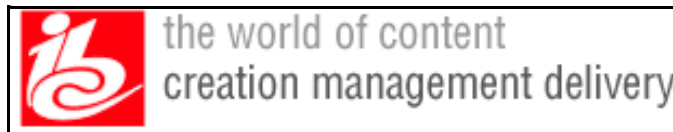
IPTV was a hot topic and was very prominent during the conference and on the show floor. Digital Cinema (or D-Cinema) was big at IBC, too, and IBC delivered the real thing with the free digital screenings of Disney's *Pirates of the Caribbean – Dead Man's Chest* and Sony's 3D animated feature *Monster House*.

D-Cinema is rolling out commercially now and is no longer “a science fair project”, says Jerry Pierce, SVP of Technology at Universal Pictures. Pierce says that one of the main drivers for D-Cinema is to lower distribution costs, but he also says it leads to a better experience for audiences.

The use of Digital Intermediaries (DI) is key to digital cinema, both from a production cost point of view and in preserving the vision of the director and the cinematographer. With digital intermediaries and D-Cinema, Pierce says, “the final vision that the filmmaker puts together... that's the one that you're going to see in the theatre.” He adds, “we want to keep this the best image on earth”.

Though also shown at NAB in April,

Japanese broadcaster NHK's Science & Technical Research Laboratories' Super Hi-vision Ultra-High Definition TV (UHDTV) demonstrations drew standing-room-only crowds and gave many of the estimated 6,000 attendees who watched one of the 15-minute demonstrations their first taste of content projection using 4,320 scanning lines (four times as many as the best 'conventional' high-def TV) and stunning 22.2 channel surround sound. Despite the “TV” moniker, UHDTV isn't likely to ever



end up in your living room — it's intended for commercial venues. UHDTV resolution exceeds current D-Cinema standards.

Europe lags behind North America in terms of HD roll-out, so it wasn't surprising that IBC touted 2006 as the year of HDTV Lift-off and HDTV was everywhere.

Clearly, the battle for the consumer, in the theatre, at home, and on the go, is being elevated to new levels. Texas Instruments demonstrated a new chip that, it says, will bring personal video recorder and picture-in-picture capabilities to mobile handsets in 2007. “These advanced features give users access to their personalized content anytime, anywhere, in the palms of their hands,” said Marc Cetto, general manager of TI's Mobile Connectivity Solutions business.

Elsewhere, IBC's New Technology

Campus also provided some interesting insights into what the future may hold in store.

One project from the Information Society Technologies (IST) of the EU's Sixth Framework Programme in particular stood out. To facilitate truly interactive TV, the IST has come up with what they call “shape-shifted TV”. This technology allows the viewer to alter the flow of content, whether that be by creating run-down lists for news programs that are based on the viewer's individual preferences, or through

changing the storyline of a dramatic presentation. Doug Williams of BT (the former British Telecom, and a partner in the project), says that IPTV offers the opportunity to “tell stories to individuals” and that “the storytelling medium should react to what the viewer wants”.

For documentaries, content can be assembled on-the-fly to mirror the viewer's interests and preferences for level of detail. As part of the NM2 (New Media for a New Millennium) project, story ‘modeling’ tools were developed that allow for this viewer interaction but allow the content creators to ensure that the various viewer-created programs are, as Williams puts it, “as aesthetically and editorially pleasing as [traditionally-scripted] television”.

This year, for the first time, IBC has made MP3 recordings of all conference sessions available, free of charge, to the general public through their website at www.ibc.org.

Is RSS in your future?

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their content could send shockwaves through the industry.

These RSS players are all very good at what they do, but they also demonstrate that we are still in the early days of this new approach to video syndication. Nothing makes that more clear than the fact that you currently have to sit in front of your PC, or connect a PC to your television, to enjoy the content you've acquired. However that will change soon – and Apple will also play a part in moving this content from your PC into your living room.



Apple announced that in January they will debut a new product

currently, codenamed iTV, that will connect to a television set, be it analog or digital, and allow for the streaming of content from your iTunes library on your computer to your television set. At a reported launch price of \$US 299, Apple's iTV may finally tempt many consumers to bridge the computer-TV divide.

Microsoft, typically not one to remain quiet, especially when Apple is taking home record profits, has been noticeably absent from this party. Microsoft's position on RSS is very unclear at this time.

At the time of this, writing Microsoft has not made any provisions for RSS aggregation of video content in its new operating system,



Windows Vista. The current rumour-du-jour has Microsoft adding RSS aggregation to future releases of their Windows Media Player.

This lack of commitment is made even more curious by the recent announcement of the Microsoft Zune portable media player and the accompanying Zune marketplace. It seems unlikely that Microsoft will remain out of this market segment for long.

The most likely scenario involves Microsoft entering this market with the recently-launched Zune marketplace and the impressive Xbox Live marketplace.

Like Apple, if Microsoft were to open the door for everyone to charge for their content, we could see a major leveling of the playing field between the large mainstream content producers and their less mainstream brethren.

Sean Crawford works as an IT Architect specializing in solutions for the media and entertainment industries. He can be reached at seanc@rogers.com

U.S. network cutbacks – just the beginning?

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On Demand (VOD) and Personal Video Recorders (PVRs), the viewer is assuming more of a self-programming role, and this may account for weakness in the early prime-time slot.

Whereas in the past viewers might have to choose between the offerings of two rival networks in the same 10 PM timeslot, today it's much easier for viewers to watch both by way of the time-shifting capabilities of VOD and PVRs. So, at 8:00 PM, the viewer may be watching the previous night's 10 PM content. Platform shifting, too, becomes an option as viewers can increasingly watch the previous night's primetime content on mobile or the Internet the following day. Indeed, this pattern has led to a redefinition of the 'prime time' concept. Conventional TV has a primetime, but so do the Internet and mobile viewing – and these primetimes occur at different times of the day (or different 'day parts' in the vernacular of the industry).

While NBC is first to publicly declare cutbacks on news programming and an intent to move away from scripted programming in the 8:00 – 9:00 timeslot, they likely won't be the last – on either side of the 49th parallel. Our networks face the same fragmentation and financial challenges as those in the U.S.

A reduction in American scripted programming content will have a ripple effect for Canadian networks. Canadian private broadcasters rely to vary-

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Are we approaching the end of physical media?

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are compatible only with a narrow range of devices.

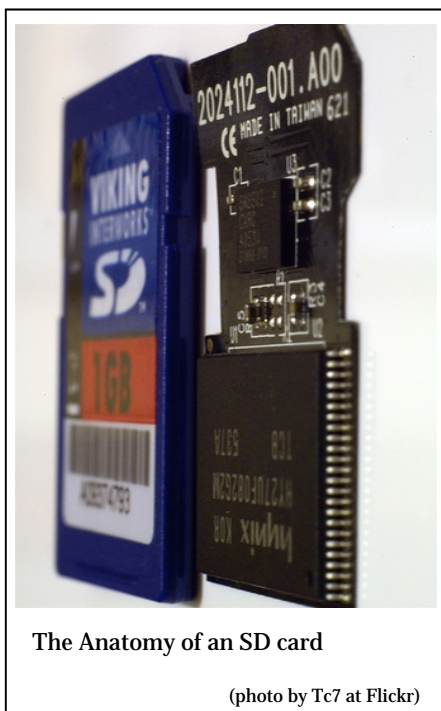
SD cards are much more versatile. My PDA can use them, as can my laptop computer and my Media Centre PC. My TV can't, but there are TVs coming out now that can. MP3 players are starting to support SD cards too. I have a cheap one that does, and the reason it is cheap is because it has no storage of its own — it relies on the storage I provide by way of a mini-SD card.

Kiosks exist where you can buy a movie and have it downloaded in a matter of seconds to your SD card. But really, storage media like SD cards, Compact Flash, and the like are great for short-term content storage but they are currently too expensive to be considered as a long-term storage vehicle (although that will probably change).

So if you don't buy your content on pre-recorded medium, what do you do to provide long-term storage for the content? Today, the typical approach is to burn the content to a CD or DVD — and that will continue to be a viable approach.

In fact, with the dawn of blue laser optical drives for PCs, with their much higher storage capacities, this will become an even more effective approach for storing large media files. But really, is this where we want to go? Regardless of how I store the content, having it in any physical form is really just a pain.

Ideally, I want someone else to look after my content for me, serving it up to me on-demand when and where I want it. This may sound unrealistic, and in today's world, it is — but only because we don't have ubiquitous very-high-speed networks.



The Anatomy of an SD card

(photo by Tc7 at Flickr)

In the meantime, though, for much of our content, we're already moving away from physical media. A song that is downloaded from a music service, stored on a hard disk, and transferred on an as-needed basis to an MP3 player never manifests itself on any of the traditional media we associate with music (record, tape, or CD).

In fact, other than for possible backup purposes, there's usually no benefit to creating a copy on any physical medium. Most computers or MP3 players can store thousands of songs and provide direct access to

all of them without the need to swap physical media components (CDs, etc).

Even the need to create a physical backup is debatable. That backup is diminished in value if it isn't easily accessible when and where you need it and it's also vulnerable to physical threats like fire.

Wouldn't it be better to have someone provide that backup service, as well as on-demand access to all of your content, when and where you want it? A trusted content management service, with content duplicated across multiple sites, could meet this need.

And for most content, there are economies of scale to be achieved by such an approach that could make such services quite affordable. Consider that *your* licensed copy of a specific version of a specific song is identical to that of all other licensed users of the song and you realize that such a service provider need only have *one* copy of a song to satisfy thousands or millions of users.

Of course, our antiquated copyright laws and traditional copyright collectives aren't ready to deal with this concept but that will surely come with time.

Even though the need for copies of content on physical media, or, indeed, even the need for multiple long-term copies of content can be obviated through technology, what is still critically important is the ef-

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The End of Physical Media?

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fective management of the entitlements of individuals consumers.

Although disputed by many, I believe that the future of commercially-produced high-quality content requires some form of digital rights management (DRM) system in order to protect the rights of content owners.

If we assume that such a requirement will exist going forward, then we have to face the realization that the management of licenses for every song, video, e-book, etc. that we commercially acquire could well become a huge challenge.

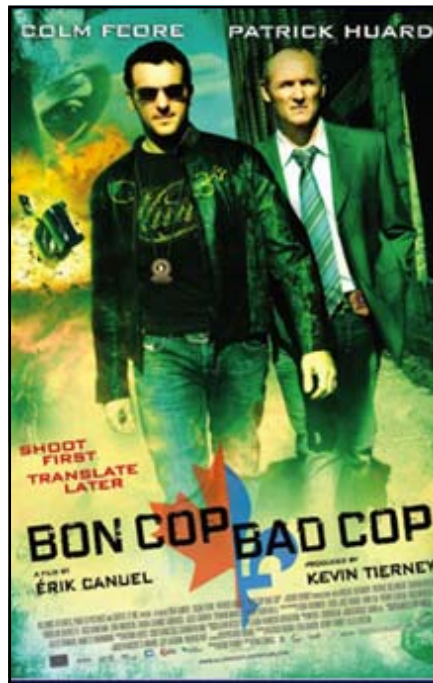
As we move content around, or upgrade computers, or re-install operating systems or re-format hard drives, chances are we lose our linkage to the content licenses we've purchased.

Why, then, wouldn't we want to delegate the responsibility for managing these to a third-party as well? And, of course, rather than separating the content and the licenses, wouldn't it make sense to entrust both to a single, trusted source?

NBC makes deep cuts

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ing degrees on dramatic programming from the U.S. as it costs less to purchase this content than it does to produce comparable domestic content. If there's a reduction in the volume of this type of programming south of the border, Canadian networks will either buy more of the cheaper programming commissioned by Zucker and his peers, or – and wouldn't this be nice – invest in more Canadian content.



Next issue:

The Two Solitudes Journal meets *The Journals of Knud Rasmussen* as we take a look inside the mind of Isuma's [Norman Cohn](#), half of the creative team that's behind this fascinating movie and other films including *Atanarjuat: The Fast Runner*.

Bon Film, Great Film!

Bon Cop, Bad Cop is a wonderfully funny exploration of Canada's two solitudes: English Canada and French Canada. The film pokes fun at both cultures, so even if you love to hate both Ontario and Quebec, you're in for a treat. And in true Canadian spirit, there's a healthy measure of hockey thrown in, too.

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The iCEman cometh — and NMBA gets a new name

The New Media Business Alliance adopted a new name at its November 16th members meeting: Interactive Ontario. (The legal name will be Interactive Ontario Industry Association). Interactive Ontario is busily preparing for its second annual new media conference.

Following on the heels of this year's very successful and sold-out iSUMMIT conference, Interactive Ontario plans a bigger event for next year: iCE 2007 — and I've been recruited to produce the conference.

As a panelist and attendee at NMBA's inaugural conference last March, I saw first hand what a well

designed and diverse program had been put together — and was impressed by the top-notch execution of the conference overall. I'm very excited to have the opportunity to build on last year's success and to incorporate the feedback received last year to make this an even better experience for the delegates.

While we'll continue to pay special attention to both the local Ontario market and broader domestic markets, we also hope to have an expanded international presence among both speakers and delegates. This year's program will explore the major trends in new media in even greater depth than last year, and will also reflect the changes that

have occurred in new media in the past year. There will also be a greater emphasis on networking, deal making and pitching opportunities. We also hope to put our money where our mouth is, so to speak, by incorporating more new media technology into the actual conference operations.

The 2007 conference will be bigger, and, I hope, even better than this year's very successful event and will be a must-attend event for anyone who needs to stay current in these rapidly changing times, whether he/she is an established player in the new media world or is venturing into the exciting world of new media for the first time.



The website for Corner Gas is a great example of using the Internet to extend the television experience. The site features games, auctions, bloopers, bios, an episode guide, a chat room, an online store and more.

As Brett Butt used to say at the end of each episode, they're "on the 'interweb' at cornergas.com". For a TV show companion website that's beyond the ordinary, check this out.

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60 Osborne Avenue
Toronto, Canada M4E 3B2
Phone: 647-477-6187
Toll-free: 1-800-315-0608
E-mail: editor@twosolitudes.com
Publisher and Editor: Alan Sawyer

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About this publication:

The Two Solitudes Journal discusses trends in the media industry and examines the simultaneous 'convergence and collision, co-existence and conflict' that exists within and between the traditional and new media worlds across a variety of media including publishing, radio, cinema and television.

The Journal may, from time to time, feature interviews and guest columnists. The opinions expressed by guest columnists do not necessarily reflect those of Alan Sawyer or of Two Solitudes.

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