EBU
OPERATING EUROVISION AND EURORADIO

MEDIA IN THE NEXT 10 YEARS

INNOVATION DAY
HD FORUM ITALIA

ANTONIO ARCIDIACONO
DIRECTOR OF TECHNOLOGY AND INNOVATION
EUROPEAN BROADCASTING UNION

EUROPEAN SOCIETAL CHANGE

› Multi-cultural challenge

  › '**newcomers**" up to 30% in some EU countries

› Multi-generation challenge

  › **65+** going up to 30 % in 2030

› **Singles/Childless** couples become **the new norm**

> › Personnalisation
>
> › Multilanguage support

Euro VOX

peach

AUTOMATED LABOR AND THE EDUCATIONAL CHALLENGE

› Problematic opportunity **gap for lower educated citizens**

› **Automation** changes function-specific jobs.

› Ultra-human jobs highly valuable

› Importance of **reskilling programs & mental flexibility**

› **Protectionist reactions** and growing tensions at global and national level

> › Personalized Education
>
> › STEM & Media Literacy

THE IMPORTANCE OF TRUST

› Our **"shared reality" is under pressure**, partly due to current media landscape

› *Synthetic media* easily made and distributed. Leads to concerns and actions.

› **Ability to compare information sources and the democratic choice**

› The **importance of trusted sources** of information and the media literacy natural defense

› **Fact checking will help**. Trust becomes an even stronger claim

› Concurrent Sources of Trusted Information

› Education to Media Literacy

A. Arcidiacono – EBU – November 2020

NEW (AND OLD) TRENDS

› **Live** => this is **happening now**, and I am part of that

› **Local** => this is **happening here**, my area/city/themes

› The power of **Nostalgia**

› Strong **growth in gaming** industry
   › Shift to cloud based and subscription formulas

› **The law of scarcity: together experiences** are very scarce today, so very valuable

› Shift in business models. **If you survive now, you'll be fine**.

› On-demand media use social again ?

› Criticism on big tech: **a call for humane technology**

› **Mindful living/working**: more attention for people mental health

ALL CONNECTED

› OTT delivery of content is **dominated by a few non-European companies** (Netflix, Disney, Amazon, …) de facto **controlling most of the distribution infrastructure and content**, with economies of scale and ability to invest one or two orders of magnitude larger than the largest European Media companies

› **Competing head-to-head only on content is a very dangerous fight to play**. It is important to produce appealing content, but it is not sufficient :

› **Content is king, but distribution is queen !**

CONTENT IS KING
BUT DISTRIBUTION IS QUEEN
AND SHE WEARS THE PANTS.

JONATHAN PERELMAN, BUZZFEED
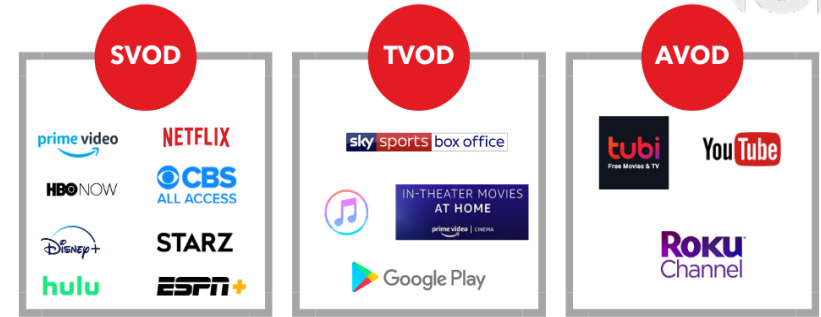
A MULTILAYER APPROACH

› If you are not able to reach your customers, you are not visible
  › 100% of the population (@home)
  › 100% of the territory (in mobility)

› **Otherwise you pay a relevant part of your margins** to a third party delivering your contents

› **Large European media players are already on multiple infrastructures** (SKY, Polsat, …), combining satellite and terrestrial to sustainably reach 100% of the population/territory
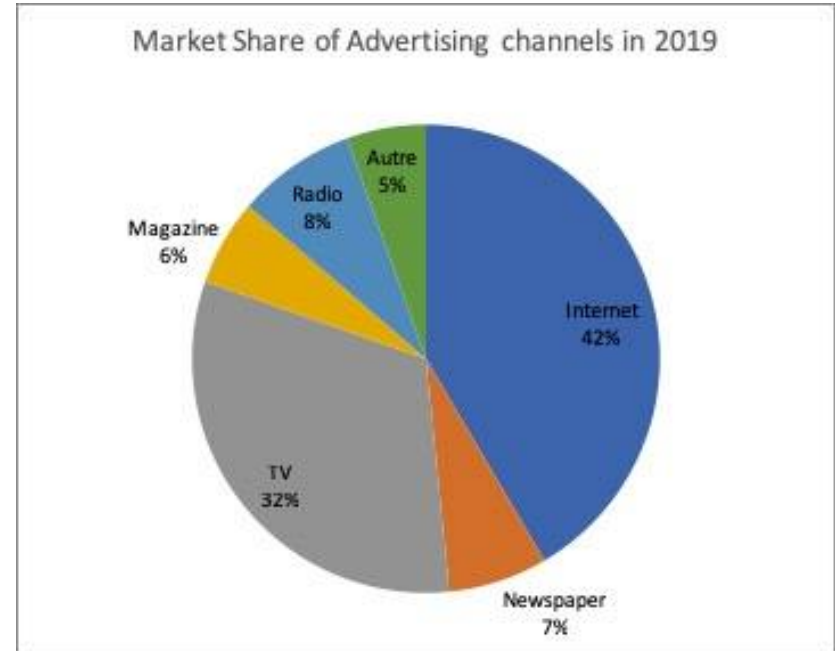
› A Multilayer approach for a sustainable offer combining
  › Unicast and Broadcast/Multicast
  › Edgecasting and local storage
› Using the law of physics at their best

5G Satellite

5G tower transmitters

5G-Cellular infrastructure

5G terminals
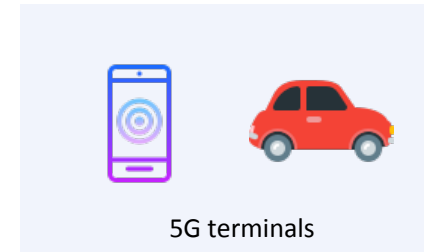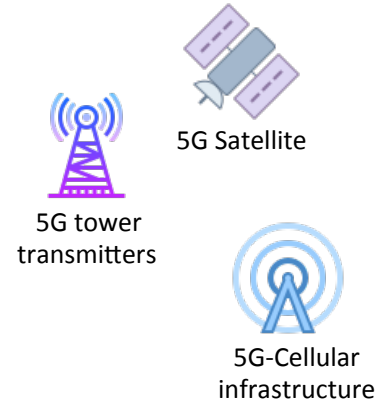
THE ADVERTISEMENT OPPORTUNITY

› Advertising still dominant for streaming worldwide

  › YouTube, Iqiyi, Youku, Hotstar, *Hulu, Peacock...*

› **Advertising until 2023:**

  › **TV stable**

  › **Radio grows**

  › **Internet grows**

› Experimenting with

  › new business models

  › and digital payments

Market Share of Advertising channels in 2019

- Internet 42%
- Newspaper 7%
- TV 32%
- Magazine 6%
- Radio 8%
- Autre 5%

THE IMPORTANCE OF THE ARTIFICIAL INTELLIGENCE

› **Artificial Intelligence toolbox becomes *mission critical*** for Public and Private Media towards 2030

› Many applications: **faster, more inclusive, more productive, more convenient/relevant**

› **Voice** Search Optimization: our voice as an instrument in a smart era

› AI will increase the need for an ethical compass: rise of the **chief ethical officer?**

› EuroVox – Language Management
› Peach – Recommendation Engine
› Metadata extraction …

EBU

OPERATING EUROVISION AND EURORADIO

THANK YOU !