Media Futures: A European Perspective

Professor W. Edward Steinmueller
SPRU – Science and Technology Policy Research
University of Sussex
UK

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What are the media industries?

We can identify a range of industries and associated companies that constitutes a media sector in our respective countries – all of them confront change, a point forcefully highlighted by the recent IPTS studies on Media and the Content Industries accompanying this conference…

I begin with three observations about change:

1. The media industries produce and distribute media content that are culturally, educationally, and socially valued – but the nature of this content is changing

2. The means for producing this content as well as the means for distributing it are changing rapidly as the consequence of technological opportunity

3. The media industries are one part of a broader set of ‘creative’ activities which is also undergoing profound change

Each of these observations raises fundamental questions about the future of these industries that I will consider today
Conventionally media content was about the medium

The way that content was conveyed was inextricably linked to an ‘audience’ which generated the revenue needed to produce this content.

Content was often for the ‘mass’ audience although specialised audiences could be accommodated with an appropriate business model.
What constitutes media content has changed.

Although the debate about the ‘quality’ of user produced content continues, the audience for all content is dispersing or fragmenting into ever smaller ‘bits.’ Audience attention and presence is ever more difficult to capture on a persistent basis.

Even as fragmentation is occurring, audiences sometimes appear where they are not expected in numbers that far exceed any reasonable prediction.

The volatility of all media segments is increasing, creating a lottery which is frightening to investors and challenging to creators and publishers.

Why is this happening?
Means of Production and Distribution

We accept that Gutenberg’s printing press altered the course of history

It should not be so surprising that if everyone possesses not only a printing press, but all the other means to produce and distribute content that the world would change

Fragmentation and volatility are consequences of the profound increase in the number of ‘producers’ (some of them simply re-publishing content produced by others) and the difficulties of filtering or selecting information which create crowd or herd effects.
The Key Distinction and Paradox

A profound or ‘paradigm shifting’ technology can be expected to transform how we see the world. For the Internet, the observation that is both obvious and elusive is that the Internet and the software and personal technologies – computers and mobiles – that make it useful have a dual character.

First – collectively they bring to life an entirely new infrastructure for creating and communicating media messages.

Second – they enable a fundamental transformation in communicative processes in which the audience is no longer mainly listens or watches.

In other words – media content can be created and delivered with greater facility than ever before, but the author and publisher are no longer privileged with respect to the audience.

This is the paradox – we are better able than ever before to deliver content, but finding audiences to watch or listen is ever more difficult.

This is because the Internet (and associated information and communication technologies) are both an infrastructure and a connection engine – each face has a different set of implications for media futures.
Because of the universal infrastructure of publishing, re-publishing and distribution we are experiencing a profound increase in variety generation.

Optimistically -- some of this variety may eventually be shaken out as individuals seek to simplify their daily lives.

Pessimistically – this variety has become a defining feature of our lives that will continue to produce growing fragmentation.

In both cases, a serious concern in Europe is that many of the elements of the infrastructure used to access this variety have emerged from, and are dominated by, US companies such as Google and Facebook.

This creates a continuing search for what might constitute Made in Europe elements of the infrastructure with much of the attention focussed either on unique European infrastructure (e.g. Gallileo GPS) or on the means to direct attention to media messages originating in Europe (e.g Europe oriented search engines – like Baidu in China or Yandex in Russia).

This is a particularly challenging task given the global reach and volume of activity which supports extensive resources for ‘localisation’ and also a global physical infrastructure of servers and advertising sales force.
It is possible to be much more optimistic about the growth in European media content.

The demand for and production of variety in media content is consistent with the variety of languages, cultures, and interests that define Europe and Europeans.

Despite this – the pace of creating web presence for leading cultural, educational and social institutions was surprisingly slow through much of the last decade.

This is changing now, although obviously under much more trying circumstances, given the environment of fiscal stringency many organisations, both public and private, are facing.

The ‘window of opportunity’ for simply ‘being on the WWW’ is closing – new efforts will need to exploit the ‘connection engine’ facet of the Internet (more later).
Made in Europe Content – Room for Improvement

Four areas still present a major challenge:

1. Responding to the ephemerality and speed of Internet time in production
   Capabilities development or work organisation reform?

2. Managing being cosmopolitan and local at the same time
   Identity is an ever more complex and distributed concept which is complicated further by mobility

3. Seizing control of ‘look and feel’
   It is surprising that the appearance of content and its presentation is so similar – there are much clearer distinctions between European and American films than between European and American websites

4. Recognising and, hence, valorising European content
   Efforts have been made and recent proposals by the European Commission are very helpful in further addressing this issue
The challenge of this decade is to find better means of exploiting the ‘connection engine’ facet of the Internet

Crucially, this is an issue of identity – attempts to maintain the mass production and distribution model for an undifferentiated audience are what will assure failure.

People seek identity online in similar ways as they do offline
- By affiliation with like-minded people
- By experimentation with different communities
- By following and nurturing interests

In Europe, the complexity and nature of identities that people will wish to express will differ from the US (or China, Japan, Korea or other societies)

In other words, creating better ‘connection engines’ is likely to be inherently a Made in Europe project...
‘Social networking’ should not be defined solely by the initial service infrastructure services that have emerged to facilitate individual presence and connection on the Internet -- Facebook, LinkedIn, Twitter and similar sites and services.

The construction of social networks is simultaneously the deconstruction of the ‘mass’ of mass media and mass markets and re-construction of channels and spaces where people will choose to go for their social, educational, cultural and other interests.

The re-construction process is still at an early stage of development!
Summary

A short introduction does not permit much time for drawing the implications of re-construction (or rewiring) for content producers and users.

Broadly, however, what is required is:

- better knowledge about what draws people into persistent and interactive involvement;
- business models that extend and mix the ‘free at point’ of consumption model (through advertising) to content on demand and subscription;
- synoptic and intermediate access methods that permit people to travel in tribes and groups of their own choosing;
- improved tools for establishing identity and sharing it with those we choose (which also means better tools for creating levels of relation and intimacy).

Successful re-construction will require giving up (perhaps gradually and with some resistance) the idea that the future involves the creation of a magic channel or content type that will bring back the mass audience.