

DISCOVERABILITY

Toward a Common Frame of Reference

-

Part 1



Canada Media Fund
Fonds des médias du Canada

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With funding from the Canada Media Fund, the National Film Board of Canada and Telefilm Canada and the support of CBC/Radio-Canada and the Media Technology Monitor.



1

FOREWORD

In its Broadcasting Regulatory Policy CRTC 2015-86, “Let’s Talk TV: The way forward – Creating compelling and diverse Canadian programming,” the Canadian Radio-television and Telecommunications Commission (CRTC) noted: “Although many parties in both the English and French-language markets acknowledged the importance of promotion and discoverability [of Canadian programming], few concrete proposals were put forward to deal with the matter.” Accordingly, the CRTC announced that it would convene a summit on discoverability for government and industry stakeholders, working together, to develop strategies and mechanisms to improve the discoverability of Canadian programs.

The Canada Media Fund (CMF), whose mission is to foster, promote, develop and finance the production of Canadian Content and relevant applications for all audiovisual media platforms, the National Film Board of Canada (NFB), recognized as one of the world’s great creative laboratories and a distributor of distinctive, relevant, and innovative audiovisual productions, and Telefilm Canada, the government agency devoted to the development and promotion of Canada’s audiovisual industry, wish to participate in this national conversation through a joint research project on issues concerning discoverability. This document accounts for part 1 of this research project.

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SUMMARY

DISCOVERABILITY: A MULTIFACETED IDEA

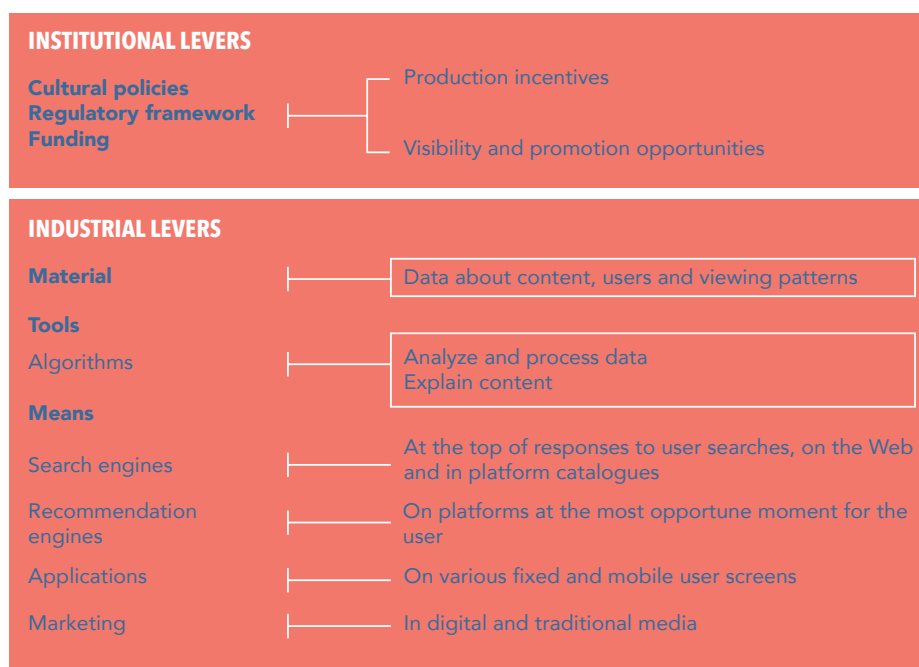
In its policy decision Let's Talk TV, the CRTC noted that discovering Canadian programming has taken on increasing importance now that technological changes have transformed how audiences consume content and made it possible for content from any source to bypass the regulated broadcasting system.

The problem has been given a name, and is known as **content discoverability**. In the audiovisual production sector, it is often acknowledged as the top challenge the industry will face over the course of the next decade.

This term, borrowed from the languages of law and information technology, may sometimes lead to confusion, most likely because it can be addressed on several different levels, and implies two groups of players with different objectives.

In this report, we propose combining levels into a relatively simple structure centered on content, the core element of all discoverability initiatives. This structure is divided into two elements: **levers** – the measures, initiatives, strategies, and tools that play a part in the development of discoverability, and **players** – the stakeholders directly concerned.

There are two main categories of levers: **institutional** and **industrial**.



..... SUMMARY

Institutional levers are introduced by government. They are the cultural policies adopted to support and protect the activities of the audiovisual production sector, the regulations established in support of those policies, and the various programs – managed by government institutions – that fund this production.

In Canada, the purpose of these levers, ever since the advent of broadcasting, has been to make it possible for the public to benefit from content dominated by diversified, high-quality Canadian programs in English and French.

When the broadcasting system operated in analogue mode, broadcasters controlled the available content, and the body that regulated their activities, the CRTC, intervened to make sure this content was consistent with its policy objectives. For example, it imposed national content quotas on broadcasters during prime time periods in order to ensure visibility for national content at times when audiences were most likely to be tuned in.

With the spread of multiple access points for audiovisual content from sources of every sort, the effectiveness of measures to ensure the predominance of national content has diminished greatly. In Canada, the CRTC responded by favouring a regulatory approach that will not focus on exhibition quotas, but instead will help stimulate production of content of sufficient quality to stand out in the current oversupply.

For their part, the government institutions that financially support the production and distribution of content are busy adapting their operations to the new context by offering programs that will give national content higher visibility, both domestically and internationally. For example, in addition to programs supporting promotion, marketing, exporting and participation in festivals, there are international coproduction agreements to seek new audiences for Canadian productions, as well as tools to promote the unique qualities of this content (e.g., the [Eye on Canada](#) website developed collaboratively by the CMF, Telefilm and the Canadian Media Producers Association).

Industry levers are initiatives introduced by the industry. These are largely based on new digital technologies. They use specific materials – data – and a certain type of tool – algorithms – in multiple ways (such as searches, personalized recommendations, and new forms of marketing).

SUMMARY

“Data” denotes information that a digital device records pertaining to the content, activities, or identity of a user. In the digital economy, data can be an extremely strategic asset in the hands of sophisticated players who have mastered the versatility of algorithms i.e., computer instructions that can give meaning to discoverability. Algorithms analyse and process data in order to highlight particular content that is often linked to a user’s personal tastes and habits. Numerous resources come into play: search engines that browse the catalogues of online aggregators, recommendation engines that direct content to consumers, applications that sort and organize results according to the consumer’s search for useful content, marketing initiatives ranging from traditional to technology-driven, based on analysis of data on users and their habits.

The challenges generated by this new environment are considerable for both institutions and the industry. For institutions, it means introducing measures to ensure that high-quality national programming continues to be available in a world where content discoverability depends ultimately on attracting and retaining the attention of extremely over-solicited audiences.

As for the industry, the use of new technological tools to capture the public’s attention—a key issue in today’s economy—raises a new set of issues. The power of algorithms to filter what information reaches users and to serve the interests of those who create them, as well as the limits of search and recommendation engines in bringing less popular content to the forefront, are just some of the obstacles to discoverability. The dominant platforms are skilled at integrating content at the core of a fluid, comfortable user experience, making content circulation a virtual cornerstone of their environments. National cultural industries must therefore contend with business practices designed for a global market, where cultural diversity has an even greater impact.

To these challenges must be added those related to the use of personal data by third parties, who must guarantee security and confidentiality to consumers made wary by certain practices and in an environment where security breaches continue to multiply.

SUMMARY



The **players** involved in discoverability – the industry and the public – are pursuing different objectives here. Industry objectives are well known, but those of the public deserve to be more thoroughly explored. We know about general preferences, their adoption of new technologies that let them find and access content at their convenience. Little is known, however, about how people find new content, their motivations, and experiences with discovery in the current media landscape. These aspects of discoverability will be explored in Phase II of this research project to be published in late summer.

3

METHODOLOGY AND SCOPE

This report is based on a review of existing literature: articles in academic publications and specialized media, reports, white papers, studies, and industry forecasts.

This analysis uses resources in English and in French, chiefly of Canadian, American, and French origins. The complete list consulted appears in Section 8 at the end of this document. As well, a few representative figures in the Canadian media industry, from both linguistic markets, were consulted. Names of these sources are likewise listed in Section 8.

To simplify the structure of this report, and for the sake of consistency with the process launched by the CRTC's Let's Talk TV hearings, the word "content" in the following pages, unless otherwise indicated, denotes professionally produced audiovisual content (television programs, webseries, feature-length films). This content may be distributed through traditional methods (television networks and traditional broadcast distribution companies), but is being distributed increasingly through online digital platforms.

The purpose of this report is to provide a common frame of reference for the Canadian community and audiovisual industry stakeholders, in order to encourage them to take ownership of discoverability by developing a common understanding of the concept, and to enable them to reflect and position themselves with respect to various challenges.

4

INTRODUCTION

4.1 DEFINITIONS

A concept with numerous ramifications

First of all, “discoverability,” as a term, belongs to the field of law in English, and to the field of information technology in both English and French. **It refers to the capacity to easily discover an item, whether it be an application or a piece of content.**

Discoverability, according to Wikipedia, “can be summed up [as] **the intrinsic ability of given content to ‘stand out’ ... or to position itself so as to be easily found and discovered.**”

Basic to the concept of discoverability are two components of equal importance: content and audience, the audience being motivation behind any discoverability initiative.

Discoverability weaves its way between audience and content in a set of complex interactions consisting of marketing initiatives and strategies, but also public policies, commercial dealings, rapidly evolving business models, innovative technologies, and changing consumer habits.

During the two “En route” events held by the CRTC and the NFB in December 2015 in preparation for the Discoverability Summit, we heard representatives from various industry sectors and Canada’s two major linguistic markets discuss a vast number of ideas, concepts, opinions and information. The concept of discoverability was amply covered, but these lively, wide-ranging discussions also exposed the vagueness that still surrounds it, and the need to frame a definition that covers its multiple dimensions.

The new world of global online content now centres on “discoverability” – the new measure of value which is a reflection not only of critical acclaim but of audience acclaim. It is the ultimate rating system without the mediation of a ratings interpreter like Nielsen. Discoverability is the methodology that drives viewers to content without the benefit of a TV Guide or TV listings and it is the measurement of success of content in a world of not 500 channels but millions of channels.
Discoverability study (CMPA)

DISCOVERABILITY

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noun: the quality of being able to be discovered or found: the legal discoverability of information.(Computing) (in relation to online content) the quality of being easy to find via a search engine, within an application, or on a website: a good way to gauge your discoverability is to type your name into Google I [as modifier]: the usability studies did not highlight any discoverability issues with the feature.

New Oxford American Dictionary

..... INTRODUCTION

Heard at the “En route” events in Vancouver and Montreal, December 1 and 3, 2015

But to us, discoverability or getting discovered is just step one. How do you then build up a channel, a consistent brand and presence on the platform to keep people coming back? Because even if you get discovered, you're like viral video. You're a one-hit wonder. If you don't keep up that momentum, that doesn't mean anything at all.

Ling Lin, Head of Content Partnerships, YouTube Canada

En route (Vancouver)

So basically, for me, I find [that] discoverability...brings up issues of public policy, regulation, funding of subjects. It speaks to many points and even relates to the world of education because media literacy is becoming important. We cannot make sense of how information comes to us, and that's extremely serious.

So for me, the discoverability challenge is access to knowledge, access to information, access to culture, and that makes the concept extremely broad.

Sylvain Lafrance, Associate Professor at HEC Montréal

En route (Montreal)

So, with all these upheavals, with this abundance of content, new television boundaries are being drawn. Under the impetus of hyper-supply, hyper-connectivity, evolved streaming...multiple screens, globalized distribution, the fact of technologies that make it possible to identify targets extremely quickly to seamlessly offer them content they had no desire to watch, except they finally became aware of it because of advertising or video on their Facebook wall, offering players in the market chances to develop new talents, new writing, new activities because ... day after day new opportunities arrive for exploiting the programs.

Pascal Lechevallier, President, What's Hot Media, Keynote Speaker, En route (Montreal)

INTRODUCTION

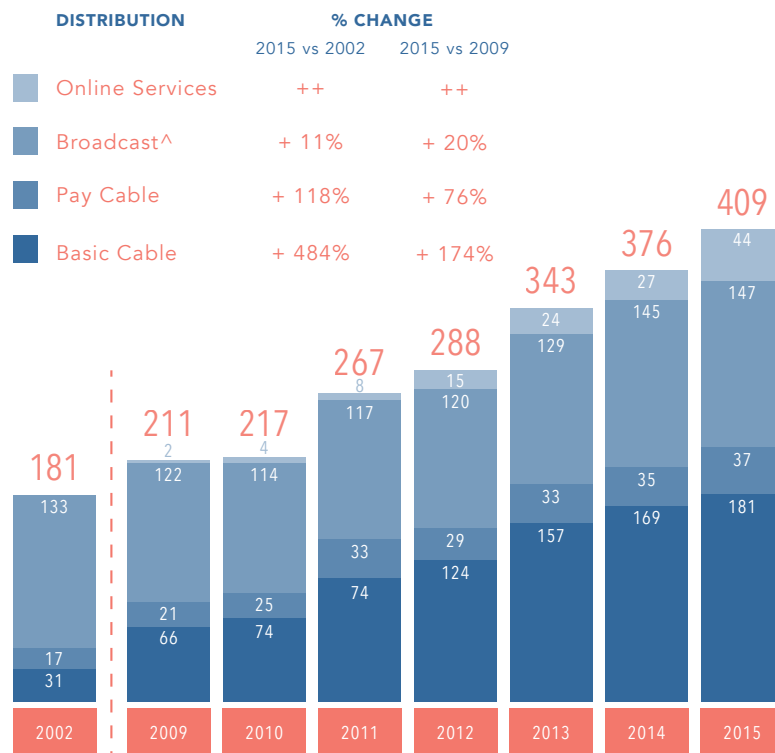
4.2 NEW CONTENT ENVIRONMENT

« Asked what his biggest concern for the TV business going forward is, FX Networks CEO John Landgraf struck a more somber tone: "We make more shows than we can afford, collectively." »¹

"Peak TV," an expression coined by FX Networks CEO John Landgraf, has rapidly gained currency in the industry in reference to the fundamental issue: either that the system is producing too much good content, and we are exceeding the limit that audiences can discover and consume, or else to revel in the present as a golden age of television art.

TREND IN THE NUMBER OF SCRIPTED ORIGINAL SERIES

Broadcast, Cable, and Online Services



Source: *Includes PBS.

[^]Includes DIRECTV.

Online Services = Amazon Prime, Crackle, Hulu/Plus, Netflix, and Yahoo. Excludes daytime dramas, one-episode specials, non-English language, and children's programs. Issued on 12/15/15

Source: FX Network Research²

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The number of scripted original programs produced by the American industry has doubled in less than 10 years. In addition to the new windfall of content circulating both on traditional systems and the Internet, there has been the multiplication of platforms that disseminate video content, from the ultra-popular YouTube to more obscure sources.

The result, according to networking giant Cisco, will be that by 2019, 80% of Internet traffic will be attributable to consumption of video content, compared to 64% in 2014.

This growth will be due in part to the advent of new users, but mainly it will come from increased availability of and demand for high-quality video content.

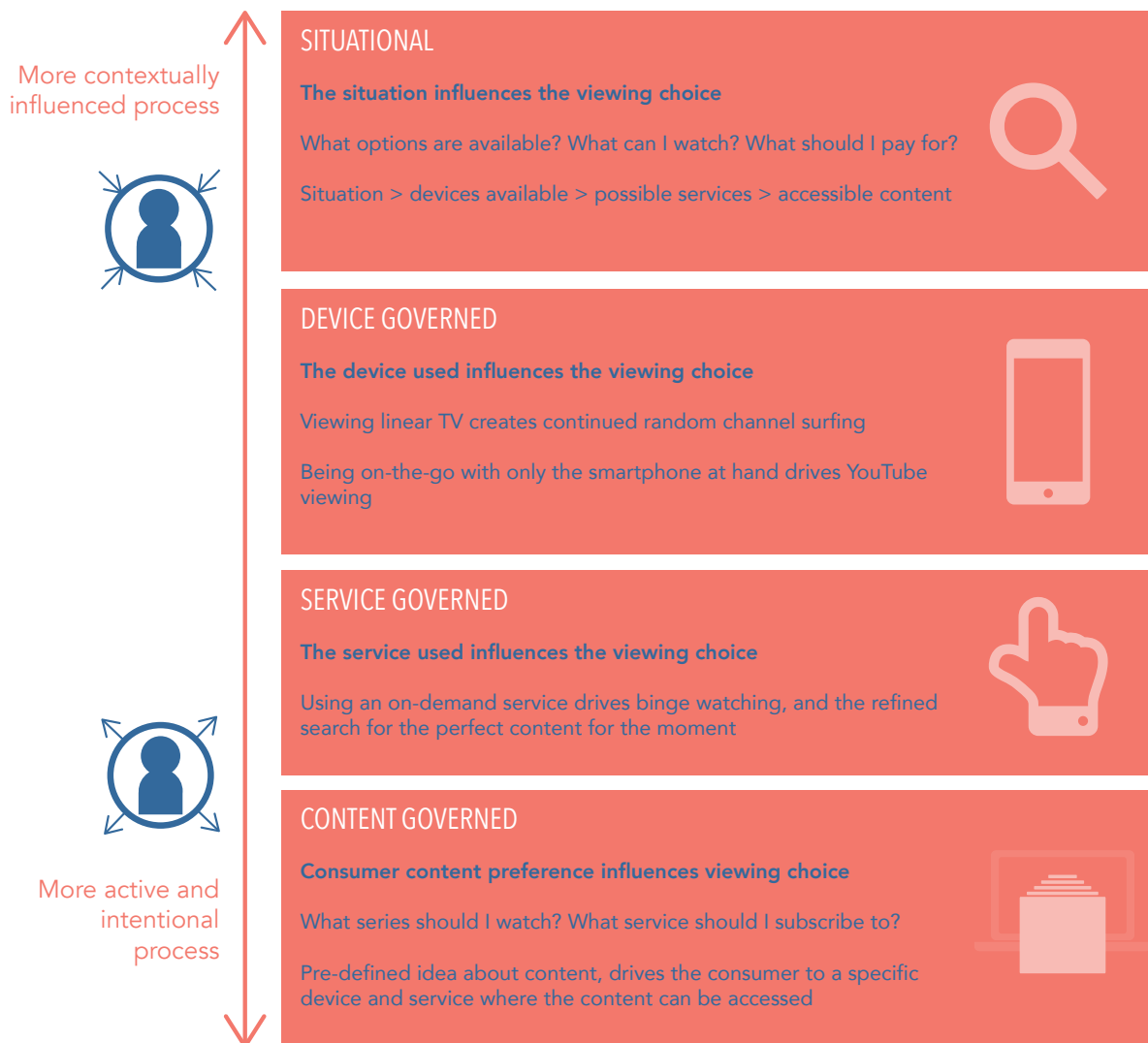
To watch all the video content now in circulation every month on IP networks worldwide, Cisco estimates that viewers would need to sit in front of their screens for over 5 million years.

To succeed in attracting consumer attention in this overcrowded world, video content must also make its way through multiple detours online services, connected devices, search engines, recommendation engines, applications, and platforms.

The resulting new context has significant impact on content discoverability. Consumer choices are influenced by the decision-making environment (what's available, the sort of device used) and by their current choices (what services they subscribe to, and the type of content that they prefer).³

INTRODUCTION

THE DIFFERENT DECISION-MAKING PROCESS WHEN CHOOSING TV OR VIDEO CONTENT TO VIEW



Source: Ericsson ConsumerLab TV and Media 2015

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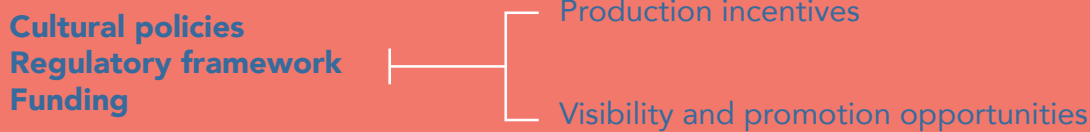
The new context for content is not solely the result of its overabundance. From this phenomenon arises a complete reversal of the value chain. When there were few distribution channels, the chances of content reaching an audience lay in the hands of people who controlled those channels. Today, power has moved to the other extreme: consumer interest and awareness. "This shifts the balance of power from determining what should be made to finding a way to convince people what to watch, listen to, or read in a world of infinitely abundant content."⁴

This reversal happened because what was scarce in bygone days, content, is now abundant, while a new resource, consumer attention, has itself become scarce. The advent of mass media turned attention into a "new currency," a phenomenon that could be monetized. In 2004, Patrick LeLay, CEO of the French private sector television channel TF1, caused a stir by claiming that his company's business model was simply selling human brain time to advertisers. What's changed since then is the speed at which the proposal became increasingly complex.

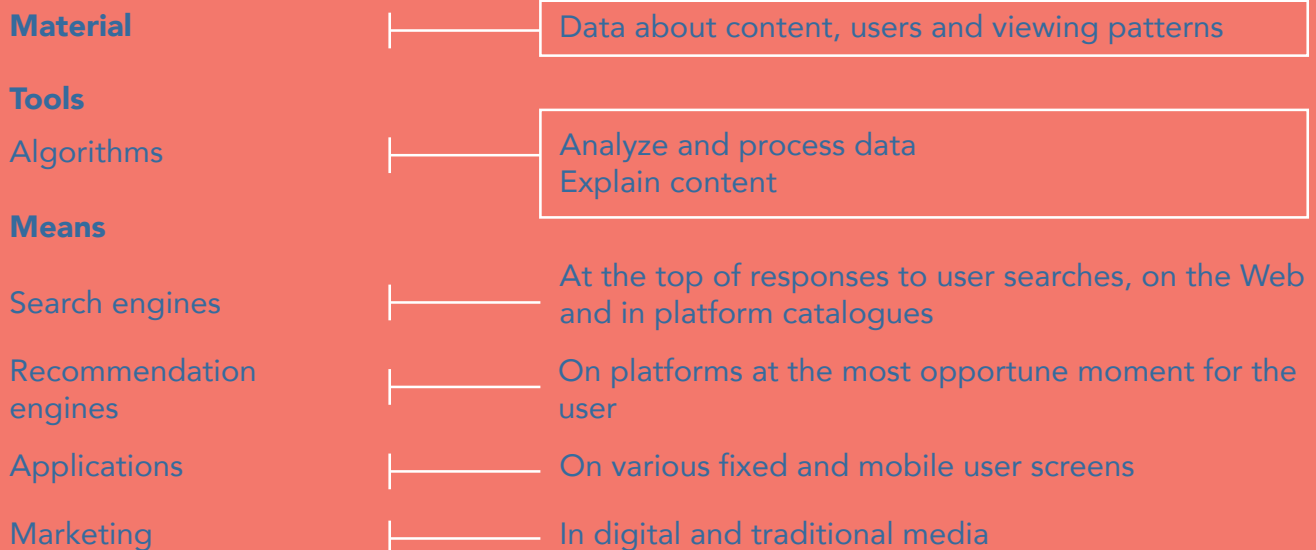
4.3 FRAME OF REFERENCE AND ITS STRUCTURE

The frame of reference that we propose here reflects our aim of defining the concept of discoverability through classification of the various ideas associated with it.

INSTITUTIONAL LEVERS



INDUSTRIAL LEVERS



..... INTRODUCTION

First of all, this structure is divided into two elements: **levers** – the measures, initiatives, strategies, and tools that play a part in the development of discoverability, and **players** – the stakeholders directly concerned.

These levers can be considered as belonging to two main categories:

Institutional levers, which include legislative, fiscal and regulatory measures established by the public authorities to support production and distribution of content, and the industry-wide initiatives introduced by institutions to support that industry.

Industrial levers, which include initiatives introduced by the industry – solutions, services, platforms, and tools derived essentially from technology and marketing.

Players likewise fall into two groups:

The content industry – creators, producers, broadcasters, aggregators, distributors, and others – who not only need their content to be discovered, but also need to be equally sure that it reaches the right audiences.

The audience in today's overcrowded environment. Audiences that have developed new media consumption habits and want most of all to find what they want, when they want it, using the friendliest tools possible..

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FRAME OF REFERENCE

5.1 INSTITUTIONAL LEVERS: PUBLIC SECTOR INVOLVEMENT

5.1.1 Tools: cultural policy, regulation, and funding

In most developed countries, authorities have established agencies to regulate and fund audiovisual production, in support of governmental cultural policies.

In Canada, these tools are the Broadcast Act, which governs the Canadian Broadcasting Policy, the Canadian Radio-television and Telecommunications Commission (CRTC), which oversees the broadcasting system, and public funding agencies at different levels of government.

Initially used as a tool for monitoring a scarce resource – the radio frequency spectrum used in broadcasting – the broadcasting **regulation** was rapidly transformed into an instrument of **cultural policy** meant to guarantee that the Canadian broadcasting system remain “a public service essential to maintaining and enhancing national identity and cultural sovereignty.”⁵

Financial support by the federal and provincial governments to promote the objectives of the Act essentially takes on the form of tax credits and grants. These forms of assistance, together with the regulatory policies, aim to give Canadians the benefit of diversified and high-quality Canadian programming in English and French.

Thus, those measures support content quality and diversity, more than distribution and visibility.

..... FRAME OF REFERENCE

PUBLIC POLICY AND DISCOVERABILITY: A CHALLENGE OF INCREASING COMPLEXITY

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In the past, due to the limited number of broadcast and distribution channels, government could monitor content sources and exercise a direct influence on what a nationwide audience could discover.

In the current context, with the growth of supranational distribution platforms for audiovisual content, traditional regulatory frameworks have proven limited.

Added to this context is the sometimes difficult state of public finances – and the resulting impact on funding for audiovisual productions. Policymakers are faced with major challenges. They must help ensure the availability and accessibility of national content, while acknowledging, as the CRTC has done in announcing its shift in emphasis from quantity to quality, that the discoverability of national productions will ultimately depend on their ability to capture audience attention in today's overcrowded world.

This is also the context that is leading agencies that fund national content and supporting cultural industries to further develop their role in promoting and support the presentation and promotion of such content.

..... FRAME OF REFERENCE

5.1.1.1 In Canada

Regulation

The CRTC is responsible under the Act for overseeing and regulating the Canadian broadcasting system.

As such, the CRTC has set requirements for broadcasting companies under its jurisdiction, regulating the availability of Canadian content programs by ensuring their **funding, positioning, and visibility** in the broadcasting system. These requirements have taken different forms over the years. For example, broadcasters have been subject to minimal spending and exhibition levels for Canadian programs, whereas broadcasters must contribute to the financing of Canadian productions and ensure the predominance of Canadian programming services in their listings.⁶

Let's Talk TV

In its Let's Talk TV policy decision made public in 2015,⁷ the CRTC **shifted its strategic emphasis from quantity to quality**: it will opt for a regulatory approach based on expenditures (the amount of money spent on Canadian programming) instead of exhibition quotas (the number of hours of Canadian programming broadcast).

It has also introduced incentives to encourage the **promotion** of original Canadian programs.

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Program presentation

- Elimination of the minimum Canadian content level for daytime broadcasts and maintenance of the 50% evening broadcast period requirement for over-the-air television channels.
- For specialized and pay TV services, a uniform level of 35% and elimination of the evening level.
- In return, the CRTC expanded the expenditure requirements for Canadian programs to all programming services. The policy varies, depending on the linguistic market,⁸ to allow for different operating conditions.

In the sea of content available on any number of platforms, Canadian programming will not only have to be “discoverable,” it will have to be chosen. This will require a concerted effort on the part of every single element of the system through the entire production and distribution chain. In such an environment, Canadian programming will have to become increasingly independent of regulatory supports such as content quotas.

CRTC, Let's Talk TV

Program promotion

- Independent programming services (essentially all those not affiliated with a vertically integrated company) can now include expenses for third-party promotion of Canadian programs when calculating their CPEs.
- At least 75% of local availabilities⁹ must be made by BDUs for use by licensed Canadian programming services for promotion of first-run original Canadian programs.

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FINANCIAL SUPPORT FOR PRODUCTION

Tax measures

Taxation is a key instrument used by governments to support film and television production and thus contribute to the presence of a large volume of high quality national productions on Canadian screens.

The current Canadian Film or Video Production Tax Credit (CPTC) program was introduced in 1995. Its primary purpose is to stimulate the production of Canadian intellectual property. Only specific genres are eligible for this federal tax credit, and applicants must be Canadian-controlled corporations.

Some Canadian provinces also offer tax credits, but these programs impose fewer restrictions regarding Canadian content and are therefore available, to some extent, to qualified Canadian productions as well as those excluded under the federal program.

A CURRENT INITIATIVE TO IMPROVE THE PRESENCE OF CANADIAN PRODUCTIONS ON ONLINE VIDEO SERVICES

CAVCO consultations on platforms eligible for the CPTC

At present, productions exclusively for mobile and online platforms seeking to reach Canadians do not qualify for the Canadian Film or Video Production Tax Credit (CPTC). On February 18, 2016, the Canadian Audio-Visual Certification Office (CAVCO) opened consultations on its intended modernization of the rules so as to include legitimate online video services that are based in Canada. The new regulation would apply to Canadian services such as Shomi, CraveTV and Club Illico, as well as Netflix Canada and iTunes Canada.¹⁰

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FUNDING AGENCIES

Canada Media Fund

The Canada Media Fund (CMF) provides financial support to Canadian television and digital media industries through two funding streams:

- The Experimental Stream supports the creation of technologically advanced, innovative, interactive digital content and software applications in Canada.
- The Convergent Stream, supports the creation of convergent television and digital media for consumption by Canadians anytime, anywhere.

The CMF employs a number of strategies to **promote the Canadian television and digital media industry**. A notable example is the bilingual website Eye on Canada,¹¹ which celebrates and promotes Canadian audiovisual content. The site was developed by the CMF in cooperation with Telefilm Canada and the Canadian Media Production Association (CMPA). The Eye on Canada brand has also been promoted in social media and through key messages conveying the strategic importance of Canadian content to audiences in several different markets.

CMF: INTERNATIONAL VISIBILITY THROUGH CO-PRODUCTION AGREEMENTS

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One of the aims of the CMF, is to promote Canadian talent and content on world markets and position Canada as a preferred co-production partner.

To do this, the CMF targets key industry players at the MIPTV and MIPCOM events in Cannes to encourage co-production and bolster funding. Also targeted are emerging markets like Encuentros de Negocios de TV (Argentina), the Bogotá Audiovisual Market (Colombia), and the RioContentMarket (Brazil). The CMF negotiates co-production agreements that make possible the development of high quality audiovisual products with cultural appeal and reach that extend far beyond the concerned nations' borders.

An interactive digital media co-production agreement was recently signed with Australia, while a 2015 agreement with New Zealand has been renewed for 2016.

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National Film Board (NFB)

At the [Montreal En route event](#), Claude Joli-Cœur, Government Film Commissioner and Chairperson of the NFB, summarized the National Film Board's discoverability plan:

In 2009, when we started to make our shift to digital at the NFB, we had a problem of discoverability. We had thousands of films that no one could view.

So we took a risk, we digitized our collection. We created platforms ceaselessly. We created applications. We went onto all the tablets, the telephones. We just launched an application for the new Apple TV application. We are launching content channels.¹²

To reach Canadians on their preferred platforms, the NFB chose various options: digital distribution for streaming content on the web, digital file compression for mobile devices, DVDs and other media. The NFB operates leading-edge technology and is seeking to reinvent its modes of creation and dissemination of media works, while also making sure that its archives are more accessible.

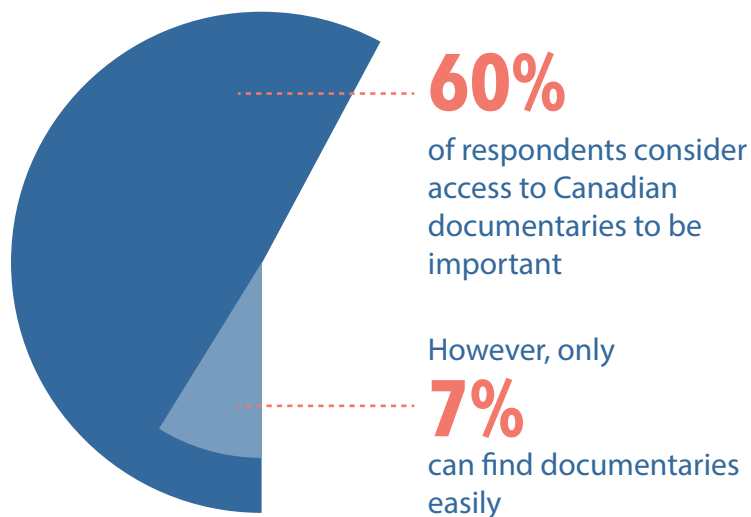
The NFB.ca portal, launched in January 2009 to celebrate the 70th anniversary of the The National Film Board, makes hundreds of its productions available, including NFB classics and new releases.

Through NFB.ca, users can **view and share NFB works online**, and its catalogue lets them access a growing selection of auteur animations, significant social documentaries, alternative film dramas, and NFB classics.

According to a [report](#)¹³ commissioned by Hot Docs in 2014,¹⁴ on the question of where, when, why, and how audiences watch documentaries, the NFB.ca site ranked second only to YouTube as the preferred platform for watching documentaries, according to respondents polled in the study.

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The same [report](#), though, convincingly shows that discoverability is an issue when it comes to documentaries:



Telefilm Canada

Telefilm Canada is a federal cultural agency devoted primarily to funding original, diversified, high quality Canadian audiovisual productions. Together with its partners, Telefilm also ensures that Canadian talent is showcased at major venues around the world.

Telefilm Canada administers several funding programs, including support for development and production, as well as **marketing programs** and support for **international marketing** and **participation in international festivals**.

Since 2011, Telefilm Canada has moved to develop its role as a **promoter**, introducing measures that have helped create major “buzz” for Canadian productions, thanks in part to nominations at the Oscars and burgeoning Canadian representation at the Cannes and Sundance film festivals.

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CANADA FIRST: DISCOVERING AND REDISCOVERING CANADIAN TALENT

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In February 2016, Telefilm Canada held a pre-launch of the Canada First (*Voir grand*) initiative, an ambitious program that's meant to do for Canada's audiovisual industry what Own the Podium has done for top-level sport at the Olympic and Paralympic Games. It's all about showcasing Canadian talent on the most widely used digital platforms, to help Canadians discover – or rediscover – Canadian content. At the moment, the campaign is being pushed on Twitter, where the account @Canada-First to convey news and information on the industry's past and present. Telefilm Canada hopes that the industry will be on board with its initiative and make it the hub for information on Canada's audiovisual scene. It has also launched discussions in this vein with other institutions and professional associations in the sector. The full campaign will launch officially, in English and French, in fall 2016.

Provincial agencies

Some provinces have established government agencies whose mission is to support cultural industries. Of the programs available, those intended to **assist promotion, distribution, and exports of audiovisual productions** are most directly relevant to content discoverability.

For example, the **Société de développement des entreprises culturelles (SODEC)** in Québec offers a cultural export and outreach assistance program ([Programme d'aide à l'exportation et au rayonnement culturel](#)) with components that support initiatives that have **significant cultural reach**, that ensure a **presence** for Quebec-based cultural enterprises in major markets and international trade fairs, and that sustain activities that provide **visibility** outside Quebec for cultural productions and enterprises.

The **Ontario Media Development Corporation (OMDC)** provides a fund for the **export** of film and television productions. The OMDC has developed the [Collaboration and Innovation Fund \(CIF\)](#), "a program developed in response to ongoing changes in the marketplace, the continued blending of content across sectors and platforms, and evolving business models." Examples of projects include preliminary development or prototyping of new content products, new platforms, and new distribution channels.

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5.1.1.2 Institutional levers in other countries

Convention on the Protection and Promotion of the Diversity of Cultural Expressions – Signatory countries

In 2015, UNESCO marked the 10th anniversary of the adoption of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions by releasing a report¹⁵ on its implementation in the signatory nations.

A review of the cultural policies and measures adopted by the signatories over the past decade to support the creation, production, distribution, dissemination, and access of cultural goods and services, shows that the challenges, and the mechanisms and measures employed, are essentially the same across many jurisdictions:

Production-related measures

- Direct funding for the production of domestic cultural content including tax relief and/or other incentives
- Support for the creation and operation of production infrastructures and entities such as cultural companies or networks
- Promotion of market access both nationally and internationally, as well as development of public/private partnerships
- Mechanisms to collect levies on the revenues of public and private cultural industries to reinvest back into national productions
- Co-production mechanisms

Distribution measures

- Local or national mechanisms to build distribution and/or marketing capacities in different fields of artistic or cultural production (as well as mechanisms to boost individual entrepreneurship and talent development in culture)
- Development of local distribution mechanisms, including the creation of physical infrastructure for the distribution of artistic and cultural content
- Content quotas
- Measures to promote the export of cultural goods

..... FRAME OF REFERENCE

- Media policies, including the promotion and diversity of public service media
- Support for organizing promotional events such as markets, fairs, festivals or years
- Support of the fight against piracy

INSTITUTIONAL LEVERS IN EUROPE AND FRANCE: PROGRAMMING AND VISIBILITY

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In 1989 the **European Union** adopted the “Television without Frontiers” (TVWF) Directive as the cornerstone of its policy in support of audiovisual programs. It was intended, among other things, to prevent TV from “becoming a means of the Americanization of people’s minds.”¹⁶ In 2010 it was replaced by the Audiovisual Media Services (AMS) Directive, which monitors the sector’s evolving technology, particularly the convergence of services and technologies, and the growing importance of “non-linear” (on-demand) services.

The AMS Directive requires broadcasters to devote the majority of their broadcasting time to European works. Of these, at least 10% must originate from independent producers.¹⁷

The SMA directive is currently being revised to account for the transformation of the audiovisual landscape and adapt existing European regulations to a rapidly evolving market and value chain.¹⁸ Content quotas and support for funding and content creation, as well as incentives to broadcast works that receive such funding, are among the matters addressed in this public consultation. The European Commission is expected to submit its revised directive in June 2016.

FRANCE

Content quotas in France are higher than the minimum 50% share of European works prescribed in the AMS Directive. According to an European Audiovisual Observatory study, France is the country with the highest percentage of European works among dramatic productions (short and feature-length films, TV dramas, animation programs) is highest.¹⁹

In terms of “non-linear” services, French regulations require:

- A financial contribution to the production and acquisition of the rights to European works
- Significant importance given to European works in proposed programming catalogues
- Highlighting, editorial coverage and recommendation of European works in online program guides²⁰

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5.2 INDUSTRIAL LEVERS: MATERIAL, TOOLS AND MEANS

The material: data, the digital footprint – the information – that a digital device records about content, activities or identity of users.

The tools: algorithms, computer to implement the means of discoverability

The means: search engines that peruse the catalogues of online aggregators, recommendation engines that direct content to consumers, applications that sort and organize results according to consumer searches for good content, and marketing initiatives ranging from traditional to technologically-crafted.

It all began with bi-directionality

The Canadian broadcasting system has already experienced other technology-driven periods of transition.

This is not the first digital revolution. The previous one occurred in the early 1990s, with the advent of digital video compression. By 1993, in announcing “structural public hearings” on the future of the communications industry, the CRTC was already talking about changing technology, increasing competition, and the “new consumer.”

The CRTC identified a “digital revolution,” which had given birth to a technology (digital video compression) that would make it possible to increase a channel’s carrying capacity while lowering transmission costs. This would, the CRTC predicted, fundamentally transform operational and competitive conditions for both programmers and distributors.²¹

The arrival of new digital technology contributed toward the broadcasting system’s transformation into its present-day form: a huge increase in the number of television channels, bi-directional transmission (at that time known as “universal addressability”) making it possible to provide users with channels suited to their individual personal tastes, and the use of a home-based “addressable digital decoder” (set-top box) in the home, to decode and decompress the incoming digital signal.

5.2.1 Material: data

Bi-directionality between transmitters and receivers in the first digital revolution, which today has shifted to the network of networks, oversaw the birth of a new asset many industries now dream of owning and controlling: user data, the digital economy's "black gold."

The oil analogy is no accident. Data is the raw material that keeps the digital economy rolling and it is indispensable to the functioning of the technologies and devices that are tackling the issue of content discoverability. Data is also increasingly indispensable to implementing marketing initiatives that are driving discoverability, something we will discuss in the next section.

And like oil, data, regardless of volume, must be extracted, analysed, and managed, to have any value.²²

Without data, there would be no celebrated algorithms to automate content recommendations, optimise user experiences, deliver all the information required by services like Netflix in order to [develop content](#) that matches the majority of subscriber tastes, or let content creators track down target audiences somewhere in the "long tail."

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TYPES OF DATA related to useful creative or cultural content

PERSONAL data in the most classical sense: identity info, contact and social or demographic profiles, which ultimately populate client databases and serve to manage of traditional customer relations.

DESCRIPTIVE data: categorical data (artist, writer, performer), characterization data (length, genre, sub-genre), but also technical data (format, compression, sampling), and legal information (broadcast rights or licencing, for example).

ENRICHMENT data: photos and biographies of artists, thumbnail critiques, notes and reviews, download links, prices, lyrics. This data can be provided by professionals (such as critics) or generated by users.

Data concerning usage, habits and **TASTES** of each user: such data can be very general (type, amount, duration, frequency of purchase/consultation, playlists created) but also highly detailed (passages highlighted in a book, reading speed).

CONTEXTUAL data, such as time stamps, location or all data transmitted by sensors (movements, emotions, physiological states, moods, etc.).

Sources: Commission nationale de l'informatique et des libertés (CNIL); [Les données, muses et frontières de la création](#)

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Catalogues: a strategic asset?

"We are lagging far behind in the dissemination and distribution of content because we haven't mastered the skills needed to transform our catalogues and directories into usable, interoperable data. If we do not give these strategic assets priority, we may risk limiting ourselves to the role of suppliers and customers in the digital economy.

"This economy is one of data, it is based on the dissemination of metadata, the data that provides a detailed description of a book, a song, a movie or any other type of content. These metadata facilitate research, promote discovery and enable businesses to enrich their knowledge of the market by crossing them with the data resulting from user interaction."

Découvrabilité : nos contenus culturels sont-ils visibles ?

Josée Plamondon, Digital content development consultant

5.2.2 Tools

5.2.2.1 Algorithms

Tamers of "dumb" data

"Algorithms are the computer processes and formulas that take your questions and turn them into answers" (Google). In the case of discoverability, algorithms ask content and usage metadata to find what corresponds to search terms, most frequent uses, or particular user preferences, and to combine and present these results in a particular arrangement.

Algorithms are not infallible magic formulas. They are literal: an algorithm is a method, a finite and unambiguous sequence of operations or instructions to solve a problem or generate a result. The accuracy of an algorithm and its goal-specific effectiveness are directly related to the precision with which these instructions have been defined.

"Data is inherently dumb – algorithms are where the real value lies. Algorithms define action."

*Peter Sondergaard, Senior
Vice-President*

Gartner Research

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In the field of content discoverability, algorithms present a number of challenges:

Algorithms have a single master

There are suspicions that some algorithms are developed to serve sellers' interests. This is consistent with the business logic of those services that serve two market segments: producers with content to sell, and consumers searching for content. More subtly, users, by playing a part in the product reporting process, contribute to refining the analytical process: "Users are therefore an essential part of any recommendation mechanism. Without their unconscious work in the Cloud, the system loses quality."²³

Algorithms generate filter bubbles that undermine variety and isolate users

The filter bubble theory, according to which algorithms, especially those of Facebook, lock in users, is well known. It has its own entry on Wikipedia: "the state in which internet users find themselves when the information they access online is the result of personalization introduced without their knowledge. Based on different data collected on the internet, algorithms will silently select what content will be visible (or not). Each user accesses a different version of the web, and they remain in a 'bubble' uniquely optimized for them alone."

These bubbles have adverse effects on other levels. "Some methods of recommendation (such as collaborative filtering) have powerful feedback effects and will therefore reinforce the notoriety of popular content at the outset."²⁴ As a result, new content items are not assessed, the system has little information about them, and they are not recommended.

Content creation might also have a bubble of its own, insofar as the key players in content production rely on algorithmically generated analyses to determine the sort of content that will be produced, thereby contributing toward an automated blockbuster-style logic, that hinders the taking of risks inherent to the creative process.

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ALGORITHMS AND DISCOVERABILITY ARE INCREASINGLY IMPORTANT

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If data is the fuel for today's search and recommendation engines, algorithms are the machinery that makes it possible for those engines to function.

Proprietary algorithms – the complex, secret formulas behind the success of Google and Facebook – are well on their way to becoming ultimate strategic assets in the digital economy. They are the key to a future economy driven by connected devices and artificial intelligence, according to Peter Sondergaard, vice-president of research for Gartner, an advanced technology research and advisory firm. He foresees an "algorithm economy" in which new markets will open where the most sophisticated algorithms will be game-changing assets traded at high prices.²⁵

So important is the place they occupy in the digital economy that the French government, in its June 2015 digital strategy statement, proposed "to engage in serious thinking about the role of algorithms, including the setting of prices, the functioning of the market or the preservation of cultural diversity."²⁶

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5.2.3 Means

5.2.3.1 Search and recommendation engines

Making the best use of data

- Search and recommendation are the two methods most often used by online content sites to promote discovery of their catalogues.
- Searches and recommendations are generally automated, algorithmic operations.
- Search can serve two purposes: finding content online, or finding specific items within a specific piece of content.
- Recommendation engines can use various automated or human-based approaches such as lists of critiques which may sometimes combine the two.

Searches: serendipity and limits

Searching is the “default” function of all online services commercially based on an extensive catalogue.

It's also serendipity's tool: discovery by chance, but chance that is guided by the optimization of content through cross-referencing techniques.

As Tessa Sproule, founder of Vubble, reminded the audience at the Vancouver “En route” event, searches meet their limits despite modern technology's incredible power.

For example, Google has created an algorithm that can tell with 75% accuracy whether there is a cat in a given video. «That's is fantastic, that a computer can do that. I think that's phenomenal. So could my two-year-old neighbour. And the thing that my two-year-old neighbour can do is say whether or not it's a funny video, a sad video, a – you know, an upsetting video, all of those things that computers actually can't do.”²⁷

Content recommendation: captivating users

Despite the magic of serendipity, searches alone do not provide a particularly easy or enjoyable experience. They may even lead certain users to quit the platform where (optimised) chance led them. In the case of online video-on-demand services, searching is not an attractive offer for subscribers: the

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experience of getting lost in the catalogue could discourage them from finding interesting content – or worse, cause them to unsubscribe.

“Experience” is the key word here. As pointed out in *Entering the Age of Experience* (the most recent CMF Trends Report): “this is an experience of another sort: the User Experience, awareness of which needs to lead content creation and distribution today. The User Experience – how individuals perceive, respond to and interact with the content they consume – is what’s driving the ever-growing connection and interdependence between content and technology.”

Optimising user experience is the reason why YouTube offers other videos in the right-hand window of its website. Before being listed in this special showcase, a video will first be filtered through a metadata analysis, which detects similarities between its content and that of other videos (hence the importance of comprehensive metadata corresponding to the most frequently used standards). But it must also have achieved a high “engagement rate” as calculated by YouTube’s “Watch Time” ranking algorithm, which calculates the accumulated time users devote to an item (rather than the previously used «view count»).

To keep its customers happy during the very small window – one or two minutes – during which a typical consumer browses 20 to 50 titles before giving up and going elsewhere, Netflix employs 300 people and spends \$150 million per year to maintain and upgrade its content recommendation engine.²⁸ This is based on a business logic that Neil Hunt, who leads the product team that “optimises the Netflix experience,”²⁹ quantified in a 2014 presentation: fast recommendations that deliver “better choices” to customers may help avoid 1% of all subscription cancellations. That’s worth \$500 million a year.³⁰

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CONTENT RECOMMENDATION SYSTEMS CAN BE ADVANTAGEOUS TO CULTURAL DIVERSITY ACCORDING TO NETFLIX ³¹

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In early 2016, Netflix completely overhauled its recommendation system to adapt it to an international audience.

When Netflix launched in 130 additional countries, it faced a vast amount of uncharted territory, where subscriber habits were unknown to the recommendation engine, which therefore lacked data for its algorithms.

Previously, the recommendation system was segmented based on subscribers on a same territory. Now it is a global system (Netflix expects to be active in 200 countries by the end of 2016), based on subscribers' personal tastes and preferences, regardless of the country they happen to live in.

For Neil Hunt, recommendation systems contribute to cultural diversity by allowing niche content to find audiences on the "long tail." After all, he argues, the business logic of dominant cultures leads them to displace local, regional, and niche cultures. But recommendation systems make it possible to counter this invasion, or at least mitigate its impact. France has everything to gain by seeing its culture exported around the world, instead of restricting access to a global culture on its screens, he points out in reference to France's national content quota system, and the suggestion, widely discussed in France, that Netflix recommendation algorithms should be publicly controlled to ensure they do not favour one particular type of content over another:

"If we do the right job with our recommender systems, we can truly enable a global culture."

Source³²

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5.2.3.2 Content curation: people versus algorithms

Content curation

A method which consists of searching, selectively sorting, collecting, organizing, and commenting upon a large volume of continuously produced information, and sharing the results as web content on a given subject, within a given community.

Source: Office québécois de la langue française

With the advent of the Internet, online broadcasting and social media, and with the dematerialization of media content, digital curation emerged as a term designating the maintenance, collection, and archiving of digital assets.

In the Internet world, this term has gradually acquired another sense, and the expression “digital curators,” besides meaning those in charge of curation, also applies to those arbiters of taste – many of them experts in their own right – who recommend content and build playlists for online broadcasters.

Many believed human curation had been supplanted by algorithms, as the latter grew in speed and sophistication, but curation of recommendation lists by people made a major comeback in the summer of 2015, with the launch of the Apple Music service, among others. One of the main selling points for the service, advertised as “a revolutionary streaming music service,” was the fact that its playlists were programmed by “world-class music experts.”³³ Apple’s press information also promised subscribers that its experts would become better curators the more they listened.

The same logic applies to Vimeo’s online video service, which figures that its “staff picks” – best-content playlists created by an internal team of experts – represent a competitive advantage over giants like Amazon and Apple.³⁴

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5.2.3.3 Apps

Are apps the future of television?

Apple CEO Tim Cook stated, when launching the latest version of Apple TV at the end of 2015, that applications or “apps,” the class of programs that run special processes on a computer or smart device, are the future of television.

Not everyone among digital content observers agrees with Cook’s prophecy. Opponents argue that agglomerating television programs and services on a TV-based «App Store» does not solve discoverability problems,³⁵ despite technological innovation embodied in the voice-controlled search feature now available on the Siri voice command app.

Right now, the main advantage of Apple TV over other devices is its speed and ability to launch searches on several popular platforms, including iTunes and Netflix. But this search function is not really better than those of the competition, according to analysts. (Note: most Canadian cable TV companies also offer Netflix and a universal search feature with their own remote control app.)

It is precisely because Apple’s iOS operating system has been adapted to the television environment that others see the future of television in apps, or at any rate in apps carried on the tvOS App Store, helping generate the same kind of runaway enthusiasm in the TV market that it did in the apps market. (Apple reported that consumers made over US\$20 billion in purchases from its App Store in 2015).

Apple has been feeding rumours about its intentions with regard to television for some years now, and there’s healthy speculation that the company may turn the television ecosystem upside down just as radically as it did for music.

One lesson to be drawn from Apple’s winning ways: success with content-access apps and devices means they must be extremely easy to understand, decision making needs to be minimized and the proposed user experience must be fantastic.

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5.2.3.4 TV guide apps

Remote control apps supplied by the majority of broadcast distribution services and downloadable for tablets and smartphones make access to programming easy and simple. Devices that allow television viewing over the Internet provide these apps as well. Apps increasingly offer personalized recommendations in their programming guides, as well as access to social media and internet-based resources and services.

These guides will drive content discovery for 75% of TV audience by 2025, according to one study, *The Recommendation Revolution – The Future of Recommendation-Driven Guides*, written by analyst Alan Wolk for the Diffusion Group (TDG) and published in January 2016.³⁶

According to Wolk, in the near future cable television distributors will offer a new genre of TV guide apps that can include large numbers of audiovisual content streams circulating online, from traditional television to video-on-demand services, all processed, most importantly, through recommendation engines – the Recommendation-based Programming Guide (RPG).

Cable distributors have every incentive to integrate recommendation engines into their TV guides, Wolk explains, because this could lead to a new source of revenue; recommendations paid for by the networks seeking to promote their shows. Thanks to advances in programmatic advertising, the system could send precisely targeted promotions for shows at the exact times when users are making their decisions.³⁷

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5.2.3.5 Materials (hardware): an indirect lever

Although they do not directly affect content discoverability, the devices that provide access to linear and online programming – cable decoder boxes, smart TVs, Chromecast, Apple TV, and other devices that allow wireless communication between a computer and a television – provide control over user data that gives them a key competitive advantage.

As such, they have their place in this inventory of discoverability levers.

SET-TOP BOXES

In Canada: set up an industry working group

In its Let's Talk TV policy decision, the CRTC explained why it required the industry to set up a working group to focus on set-top (decoder) boxes: "Viewer information will be essential in the emerging viewer-centric television environment. The Canadian television industry should have access to appropriate tools to effectively respond to changes in the industry and to the needs and interests of viewers, provided that the privacy of those viewers is protected. A set-top box-based audience measurement system could be such a tool as its data can be used to measure viewing levels of programs more accurately. Such a system would improve the industry's ability to provide Canadian viewers with the programming they want to watch and the information they need to make informed choices. It could also serve to increase revenues flowing to program creators."³⁸

Numeris, as a member of the working group, conducted tests from December 2015 to February 2016. A report should be made public at the end of April.

In the US: competition in the set-top box market

In February of this year, the Federal Communications Commission (FCC) circulated a proposal aimed at breaking pay-television's monopoly over the boxes that decrypt their signals. In the US, rentals of these devices represent \$20 billion per year in revenues for cable and satellite companies.³⁹

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Opponents of the proposal cite the enormous rights management problems that the measure would generate. But especially, they see Google – which has made known its interest – as a shadow on the horizon. They fear Google would divert advertising revenue away from content creators and into its own coffers if it manufactured a set-top box.⁴⁰

Ultimately, though, pay-TV service providers are worried less about advertising revenue going to Google and more concerned about losing access to customer data. As Brett Sappington, director of research at Parks Associates, puts it:

“Data is really the new area of competition...I think if the pay-TV providers are looking at competition long-term in the future, that’s the main concern. Who has access to that data, how do they use that data. If it’s an open-network, open-device world, how do Comcast and Verizon and Dish Network ultimately compete with Google and Amazon?”⁴¹

Other issues: interface and device interoperability and standardization

Whether we’re talking about a set-top decoder box supplied by a cable or satellite company, a smart TV providing Internet connectivity, a peripheral devices such as Chromecast, Roku, or Apple TV, the choice of apps, content and services to be preinstalled, supplied or accessible depends on many parameters, most of which entail competitive issues that may affect the diversity of emerging content in the digital world over time.⁴²

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5.2.3.6 Marketing

Methods most frequently employed:

- Social marketing
- Search engine optimization techniques
- Digital advertising campaigns
- Grassroots stunts (online and “real life”)
- Influencers
- Traditional marketing

Discoverability and marketing

It is not the purpose of this document to prepare a comprehensive inventory of marketing strategies that may encourage the emergence of content in the public eye. These strategies are numerous and well documented. It is enough here to sketch the main outlines: discoverability may bring with it a hefty dose of marketing, but it is not solely marketing, as this paper seeks to demonstrate.

In 2013, the Canadian Media Production Association (CMPA) published a report on discoverability that focussed on the question of how marketing can contribute to discoverability in a marketplace of “daunting” magnitude and complexity, where “the juggernaut of social media” has completely transformed the way in which audiences learn about and consume content.⁴³

The principal marketing tool for discoverability is definitely rooted in **social media** and the multiple points of contact they can establish with the public. The CMPA report ranks social media first among the most effective marketing techniques, with Facebook, Twitter, and then YouTube in order of importance for discoverability campaigns. Next in importance to social media are **search and related optimization techniques, digital ad campaigns** with tie-in **grassroots stunts targeting communities of interest**, and lastly, as the least important strategy, **traditional marketing** (such as print ads).

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Key to these successful online marketing campaigns, which really do improve a given content's chances of being discovered, are the identification of **"influencers"** and their early engagement in the campaign, **activation from the outset of fans and their conversion into "superfans" and ambassadors** for the content, **creation of marketing content tailored to the strengths of each platform** and **frequent, authentic conversations with the community** created in this manner over multiple platforms.

The line between creativity and marketing has blurred. As creators and distributors work harder to engage audiences, the 'creative' in their marketing efforts has been heightened.

CMPA's study on discoverability

Most important is the **establishment of a relationship between the audience and the product as early as possible in its lifecycle** ideally from the moment it is conceived. This is seen as the key factor in any discoverability initiative. "The notion of discoverability is not an after-market thought, it is now central to the development and production process."⁴⁴ A cultural product that seeks potential audiences from day one has a very good chance of being shared within a community, and that community will remain loyal.

DISCOVERABILITY MARKETING: A FEW TRENDS

Influencer Inc.

In a world dominated by technology and the automation of roles we had supposed were reserved exclusively for people, the human relationships formed on the web between YouTubers (and other, more traditional stars championing social media) and their fans are fast becoming a major asset, a high-end strategic factor increasingly sought after to be included in the array of marketing tools.

For example, the authentic and highly personal presence of YouTube stars who are also active on other social media platforms has created unique relationships with their audiences. Their influence impacts millions of people. Many of them by now transcend the platforms that gave birth to them and have become powerful brands, arbiters of taste, who have established direct relationships with the public.

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These social media stars have become a force that many players in the entertainment and marketing sectors are attempting to use for their own benefit. The highest YouTube incomes may actually stem more from contracts with various brands than from the advertising revenues distributed by YouTube. In a Boston Consulting Group survey, nearly one quarter of millennials, the segment most coveted by advertisers and YouTubers' natural audience for YouTubers, said that celebrities influenced their buying decisions. The rate is four times higher than among baby boomers.

The importance of influencers grows as discovery functions get saturated. As "Likes," positive comments, and "Shares" increase, the more tastes level off, the more serendipity factors shrink – especially for unexpected discoveries. In this context, the special links between these stars and their connections to an audience derived from a segment as desirable as millennials become privileged channels to reach and influence them.⁴⁵

For the CMPA's Discoverability report, the authors surveyed content creators and buyers. For them, influencers play a fundamental role in appeal on social media. Influencers play the role of critics, evaluating products and consequently prompting subscribers to try them (or not). Identifying the influencers who operate in a given product's sphere of interest is a crucial first step in a great many social media campaigns.

Transmedia

According to the eminent American media scholar and transmedia theoretician Henry Jenkins, transmedia storytelling "represents a process where integral elements of a fiction get dispersed systematically across multiple delivery channels for the purpose of creating a unified and coordinated entertainment experience."⁴⁶

Transmedia promotion uses these resources to create engagement and recommendation around a work. Beyond marketing content, transmedia promotion allows consumers to engage in different ways, at different levels, where they are and, ultimately, gets them involved in building the narrative world.⁴⁷

Since the art of telling stories is what the media do best, the association between television shows and transmedia marketing strategies comes about naturally. In relation to content discoverability, a trend is emerging which may well become widespread.

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A recent example of this trend was the campaign for the launch of the fourth season of *House of Cards* on Netflix, which coincided with the beginning of the American presidential election campaign. Frank Underwood, the central figure in the series, invited himself in the actual campaign with the release of a teaser in the form of a presidential campaign spot during the broadcast of the first major television debate featuring all the candidates in the Republican primary. In addition to a few “real life” publicity stunts (the official opening of candidate Underwood’s headquarters, and the unveiling of his portrait at the Smithsonian National Portrait Gallery alongside portraits of other American presidents), the campaign was supported by a website allowing visitors to continue the experiment, including messages inviting people to follow Underwood on Twitter and Facebook.

Another example, also for a Netflix series launch, this time in France. To publicise the launch of the series *Friends* – a show that predates YouTube – for an audience that’s completely at home on YouTube, the Ogilvy Paris agency tagged searches on the most popular YouTube videos to launch pre-roll ads featuring clips from the series. A search for “cute cats,” for instance, opened a clip from an episode featuring a cat.⁴⁸

The aim of such campaigns is to subtly penetrate people’s everyday emotional lives, weave the narrative into their reality, and ultimately, be allowed into their online social life, thereby profiting from the multiplier effect of social network sharing.

6

STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY

An environment where change is the only constant

6.1 THE PUBLIC

Content creators, producers, distributors, and aggregators are investing major efforts and resources to ensure that consumers get content that's just right for them and get it at just the right time.

These efforts and resources are often driven by today's new technologies and as well as new online services and apps. But while quite a number of studies can be found that measure adoption of these innovations by consumers, little is known about their real effect on the public.

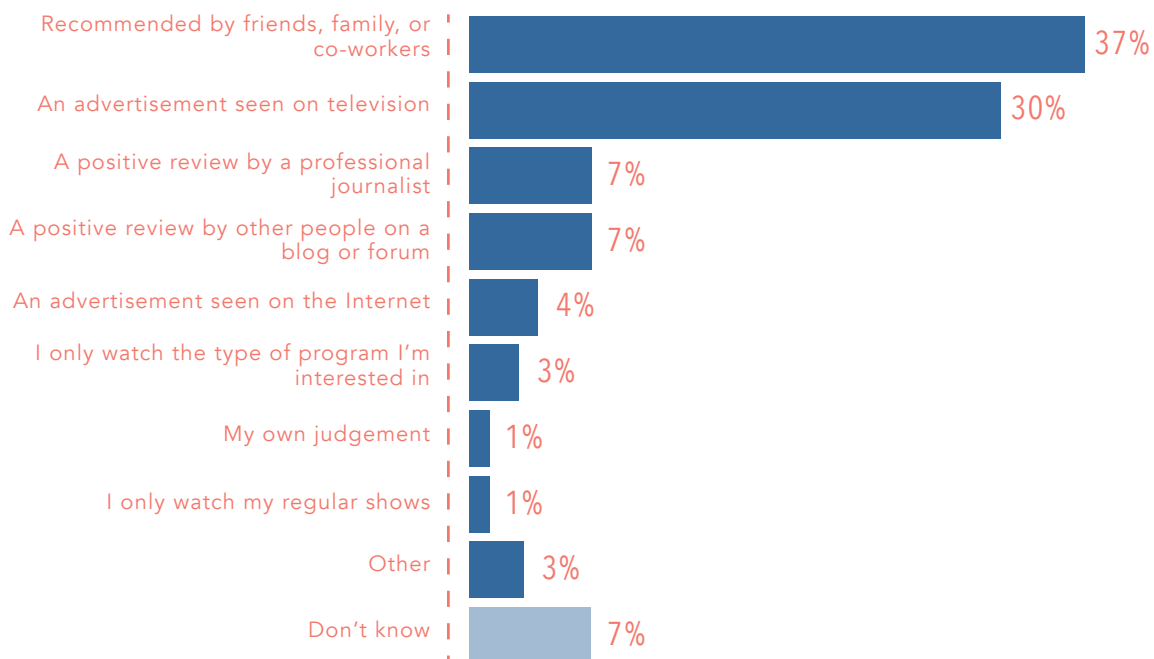
In some surveys, people were asked questions about the factors that influence their choices as viewers, or that lead them to discover content. Based on the available findings, it seems traditional factors still predominate.

For example, in a Léger survey, "Canadian Opinion of Canadian Television and Digital Media Content," conducted for the CMF in March 2013, people were asked, "In general, what convinces you the most to watch content (movies, programs, TV dramas or series, etc.) or to choose a video game?" Among the responses, **recommendations by friends**, family members or co-workers ranked first (37%) and **advertisements** second (30%).

STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY

REASONS TO WATCH CONTENT OR CHOOSE A VIDEO GAME

In general, what convinces you the most to watch content (movies, programs, TV drama or series, etc.) or to choose a video game?



Canadian Opinion of Canadian Television and Digital Media Content, 2013.

Another survey conducted in the spring of 2015 by Viacom International Media Networks as part of the TV RE[DEFINED] research project, explored how audiences in 14 countries discover and watch content. Its results were substantially the same. Based on the research, viewers' "initial awareness," the "discovery process" by which they find new content, followed a traditional pattern: **29% found new programs by channel surfing on linear TV, 20% learned about new content by word of mouth** ("in-person conversations are even more influential than communications on social media"), while **16% get their information from TV promotions**. Video-on-demand services online like Netflix accounted for "less than 1% of initial discovery."⁴⁹

..... STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY

In a 2014 study on audience behaviour (prepared for Telefilm Canada, the Canada Media Fund and the Société de développement des entreprises culturelles du Québec) Ad Hoc Research set up eight focus groups in four Canadian cities. The published report, *How Canadians Select Audiovisual Content*, again identified word of mouth as a predominant factor in consumer choice. **"Discovering a series is mainly the result of word of mouth..."**TV spots are also a fairly common means to raise awareness, showing key moments to capture attention and make people want to watch the series or episode. Other ways of discovering a series include online reviews and recommendations and availability on a given source."⁵⁰

Ericsson, which releases a yearly study of media and television consumption in several markets worldwide, described the content discovery problem in its 2013 report this way:

*With so many different ways of accessing, discussing and viewing video, the process of discovering new content has become vital to individual consumers. Each person's approach to discovering new entertainment is highly unique and complex, and the decision-making process is subject to a range of different influences.*⁵¹

The complexity and originality of discover processes are owing, among other things, to the fact that discoverability, from the viewpoint of the consumer (the target of all of the initiatives described so far) is part of threefold continuum:

- **Discovery.** In order to discover new content, consumers must first be exposed to its existence, which in today's overloaded media, may occur on different levels, in different ways, and with different tools.
- **Choice.** Consumers must then make choices within the available content shown to them. The context in which the decision-making process unfolds exerts an influence on final choices.
- **Access.** Last but not least, consumers must have simple and user-friendly access to the content.

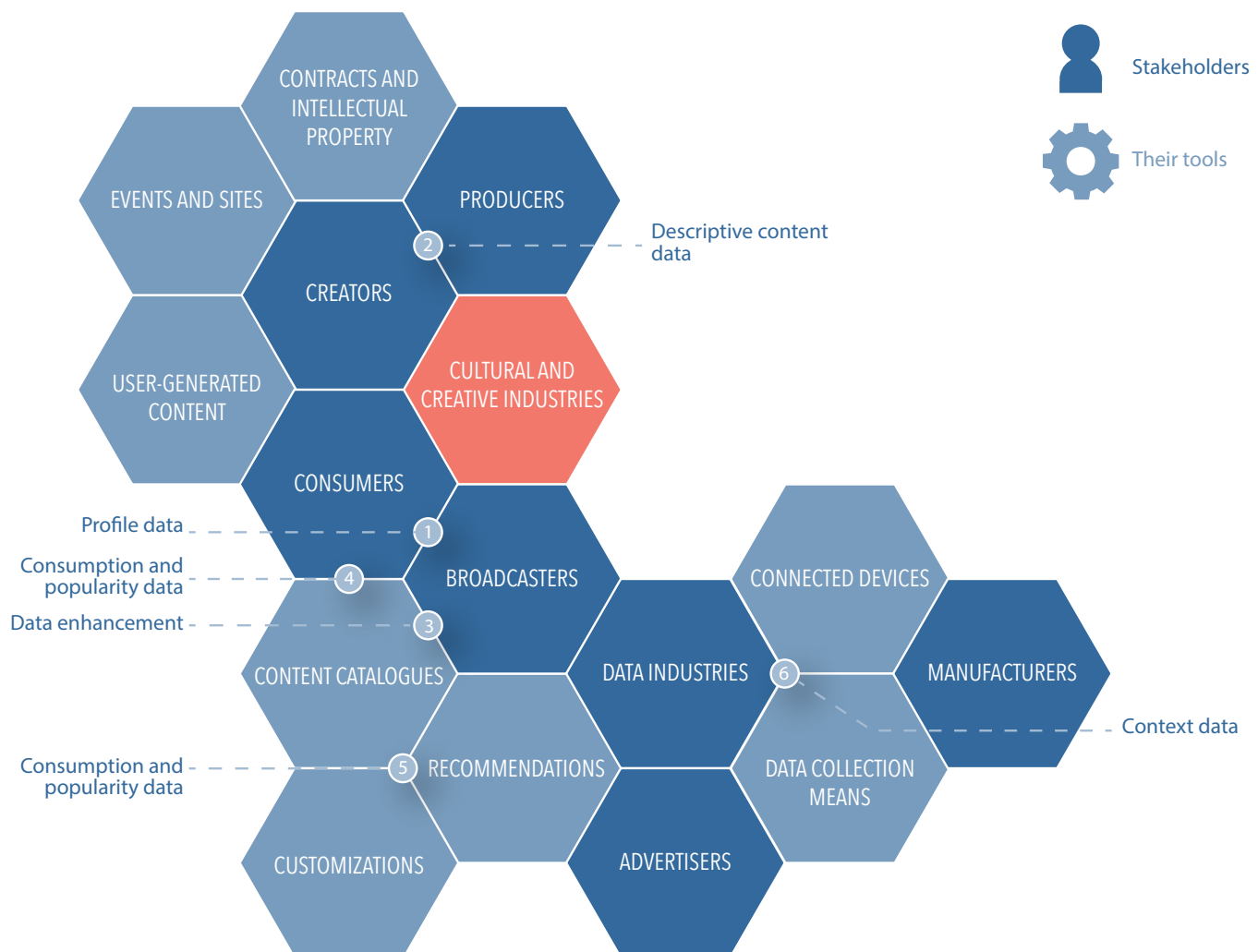
..... STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY



In the second part of this report, scheduled for release in the summer of 2016, we will explore these three questions in greater depth: how consumers learn of the existence of content, how they make their choices, and what channels are available to them (particularly in Canada) to access that content, based on responses to new survey questions by the Media Technology Monitor /MTM) and other sources.

STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY

6.2 THE INDUSTRY



Source : [Mylène Podvin/CNIL](#)

..... STAKEHOLDERS: THE PUBLIC AND THE INDUSTRY

Unprecedented challenges on a global scale

“While undoubtedly, the Canadian broadcasting system is experiencing a profound transition, evidence suggests that it is not in crisis. That is because it has built, over decades, a solid foundation of resources and talent that will enable it to face the future with confidence and creativity.”

— CRTC, *Let's Talk TV*, par. 30

The world media industry is currently experiencing its fourth wave of digital transformation, according to the authors of a World Economic Forum white paper titled *The Digital Transformation of Industries* and released in January 2016.⁵²

Having been through the wave of file sharing – and suffering the impact of content dematerialization on revenues – and then finding themselves confronting consumers who expected access to the content of their choice at their convenience, the media industry is now in a fourth wave, which could be called the “data wave.” This wave is characterized by the **exploitation of data generated by content, users and usage**. Organizations need to ensure the relevance of their social media strategies, see to digitizing and indexing of their catalogues – with metadata that is complete and adapted to different platforms – and make these available in the cloud while ensuring that data already gathered is developed so as to generate value.

Media organizations will have to show a great deal of creativity and innovation to maintain their relevance and viability. In this environment, it is not enough to produce the best content and distribute it through the right pipelines. That content has to be the central core of an amazing experience that's personalized for the target audience, available at any time on multiple platforms, and recommendable by the best apps.

Now, according to the World Economic Forum's report, the industry must prepare for the **fifth technological wave: the Internet of Things**, which will integrate digital media products into new physical environments, particularly in the retail and event sectors. For example, in 2016, it is expected that «connected sales» will account for approximately 44% of retail purchases, i.e., sales facilitated by a form of online interaction (videos or special offers) directed to consumers the moment they enter a store.

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For the media, the challenges raised by these advances are numerous. The costs related to **data analysis and security** will increase, as will those associated **with compliance and legal actions arising from use of personal data**. **Managing intellectual property** will become increasingly complex, and the costs will burgeon there too. Personalization and contextualization of personal data will also deliver a fair share of problems: among other things, organizations will have to ensure data confidentiality, learn to exercise transparency and operate in accordance with stringent rules of ethics, and interact with consumers who are wary of possible misuse of their personal data and well aware of the biases that can exist in online recommendation systems.

Particular challenges facing Canada

In addition to these complex challenges, the Canadian industry must deal with the characteristics of its own particular environment: the **preference for American content among English-language audiences** and the **narrowness of the French-language market**. This affects the industry's ability to support independent production, despite the success it registers.

The industry representatives interviewed as part of this research raised a number of other concerns:

The No. 1 discoverability device is the mind of the consumer. The important thing is to have content published on the platforms that viewers consult. That is where the audiences are. By the same token, being discovered does not necessarily mean the content will be consumed: the content must address the right audience, the platform where people can find it must be readily accessible, and (among other things) must not put disincentives in the way of the consumer—subscription sign-up, entering a credit card number, high prices, and other obstacles.

There exists no magical algorithm to make English Canadians prefer Canadian content. As the CRTC notes in its Let's Talk TV policy decision: "It is less expensive to acquire American programming (which has already covered its costs in its domestic market) than to produce Canadian programming. Moreover, Canadian programming is less profitable for Canadian broadcasters than U.S. programming. Without regulatory intervention, market forces thus tend to focus English-language private broadcasters in Canada on the acquisition and exhibition of American programming. This programming also benefits from Hollywood's promotional power and its well-established star system—by comparison, both relatively lacking in English-language Canada."⁵³

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Discoverability (or the absence thereof) is symptomatic of a much larger problem. Canada's audiovisual production industry is based on a structure put in place 40 years ago to protect Canadian culture from the arrival of American television. Government reacted by investing in the production of national content. This rationale for cultural protection must now be reproduced outside of that "production culture" and expanded to control content distribution as well. Some of the experts interviewed have suggested that a neutral distribution platform, unaffiliated with broadcasters, might be a solution.

To a certain extent, all video content – Canadian, American, Chinese, or Moldavian for that matter – now requires the capacity to master production and distribution mechanisms. Canadians, Anglophones especially (though the trend is growing among Francophones as well), have had major successes on YouTube, including Epic Meal Time, Matthew Santoro, Nardwuar, AsapSCIENCE, and Lilly Singh (alias Superwoman), who appears on the Forbes list of the 10 Highest Paid YouTube Stars. Does the future of Canadian content necessarily lie in distribution on dominant platforms? Netflix and other aggregators operating on a global scale will not adapt to local markets – it makes no business sense. They'd sooner pull out of a market rather than adapt their business model to its rules.

Cultural diversity truly is at risk. However, content production is by definition a competitive business. Whether we like it or not, economic "Darwinism" is increasingly triumphant. Entertainment represents the most widespread form of content.

In an environment where everyone can distribute content to potentially huge audiences, where video content works its way into everyday interactions on social media, where traditional media faces new, many-sided and widespread competition battling for attention, the audiovisual industry must reinvent itself. First of all, it must tackle how it does business – old models showing increasing signs of obsolescence – and then the relationships between the different players in the value chain.⁵⁴

Producer/broadcaster relations

During the industry consultations held by the Canada Media Fund on its upcoming strategic vision, programs and policies, the CMF sought feedback from the community on one key element: “The CMF also seeks to assess and consider new ways of increasing revenue for Canadian content by facilitating partnerships with industry players to increase the availability, discoverability and monetization of Canadian content online, particularly the catalogue.”⁵⁴

In response, contributors to the consultations pointed out that since producers are increasingly expected to start building their audiences from the onset of the development phase, assistance for marketing and promotion ought to be provided at all stages of a project and not exclusively when the production is ready for commercialization (not least because such support would allow them to reach foreign as well as Canadian audiences).

Relations between producers and broadcasters must change, as submitted in writing by the Canadian Media Production Association (CMPA) to the CMF during the same consultations: “Producers...want to engage Canadian broadcasters at the earliest (and riskiest) stages of a project with the mutual goal of creating more high quality content and targeted marketing tools, which in turn will enhance the success and discoverability of Canadian productions.”⁵⁵

Producers and distributors must begin working closely together and rethink their respective roles. In *Let’s Talk TV*, the CRTC has pointed out that, just as “many independent producers are incited to operate as a service industry, operating project to project,” so “programming services buy content piecemeal with little stake in the longer term development of programs.”⁵⁶

In July 2015, *Playback* magazine assembled a panel of experts to discuss “the discoverability conundrum.” As one of the participants pointed out, people should be asking: “Who owns the audience?” All parties should be asking themselves how they can leave each other more room for two-way collaboration with the public – for example by leaving management of social media to the

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producer, in return for a commitment to contribute to marketing the content throughout the production chain.

A remark by another participant would seem to echo many of the ideas in this paper:

"Canadian producers must assume greater responsibility for the complete lifecycle of their shows. Producers are not necessarily marketers. [But] we are no longer in the business of creating solitary stories. We're in the business of creating and building content brands and franchises with digital footprints and where audience engagement, not simply ratings, guarantees success."⁵⁷

Review of practices

Among the practices that need to be reviewed are media chronology, broadcasting windows and the time between each.

This is an idea that is current even in Hollywood, where the creator of Napster, Sean Parker, has launched a controversial project, Screening Room, which offers Americans at-home viewing of new movies on the same day they are released, using a set-top box installed for a one-time cost of \$150. After that, for \$50 per film, fans will have 48 hours to watch their own private screening.⁵⁸

It's an idea that was raised in Overview of the Canadian Feature Film Industry, a 2015 study prepared for Telefilm Canada, in which the author interviewed film industry stakeholders who "saw value in a non-linear approach to exhibition. They noted that not all feature films receive theatrical distribution, and a distribution strategy for each feature film on a case-by-case basis is appropriate."⁵⁹

Canada's media industry faces a growing number of complex challenges, if only for the sake of guaranteeing visibility and discoverability of the content it produces and disseminates. It will have to work on developing the new forms of partnerships and collaborative efforts discussed in the preceding pages. But it will also have to reassure the public about its power to exploit the data that they it itself generates, and do so in an entirely secure and confidential way: to use discovery algorithms first and foremost for the benefit of consumers, instead of personal business interests, and most important of all, to develop – in cooperation with government authorities, who themselves face the challenge of striking a balance between the need for national content and the viability of the system – a vision of its future and its digital transformation strategy.

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