

A RIVER RUNS THROUGH IT

How Streaming challenges Television

EPRA Conference, Oslo - June 1, 2023

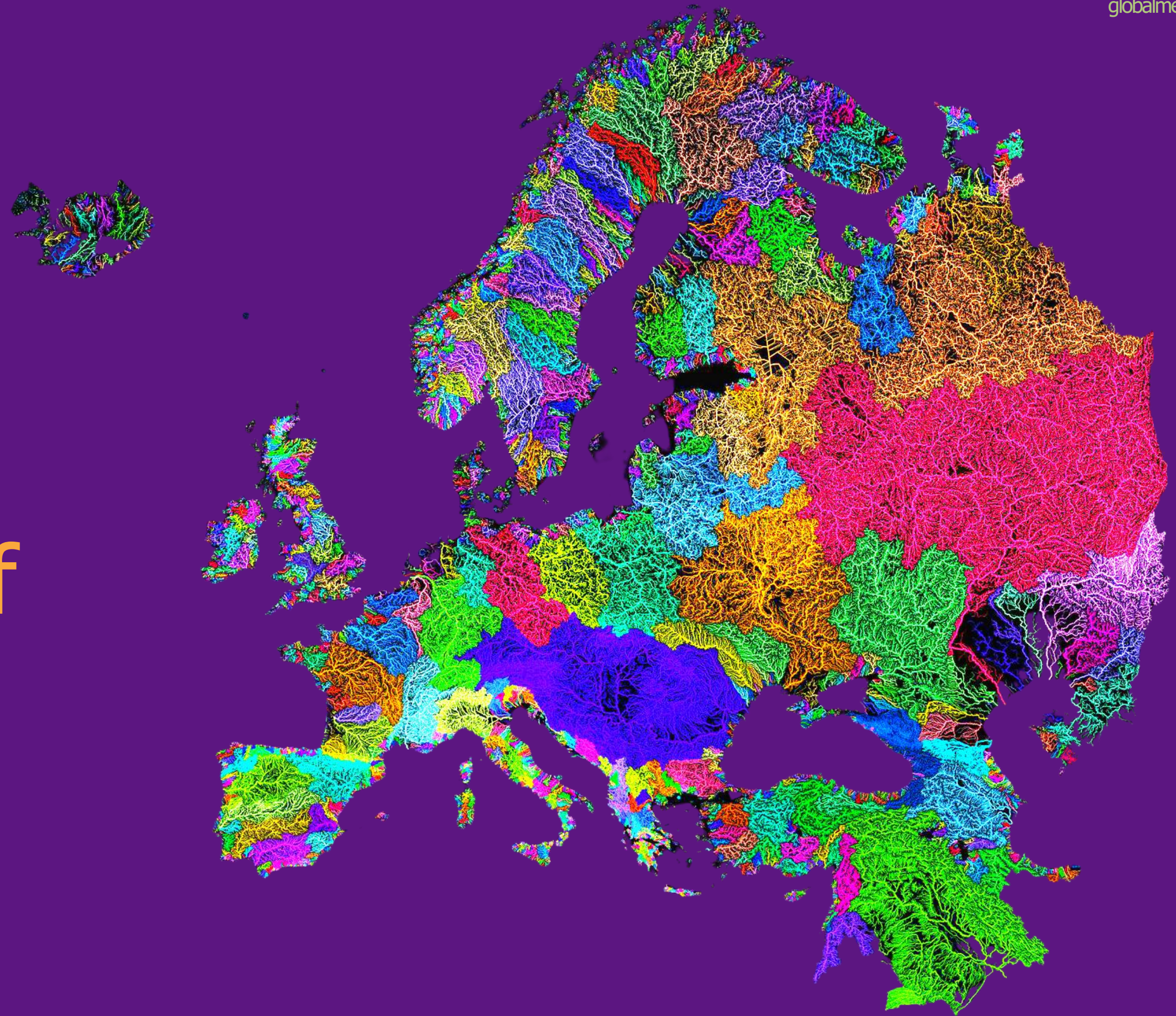
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A New Definition of Television

This is how a European Maps
looks like if we define
borders by River Basins



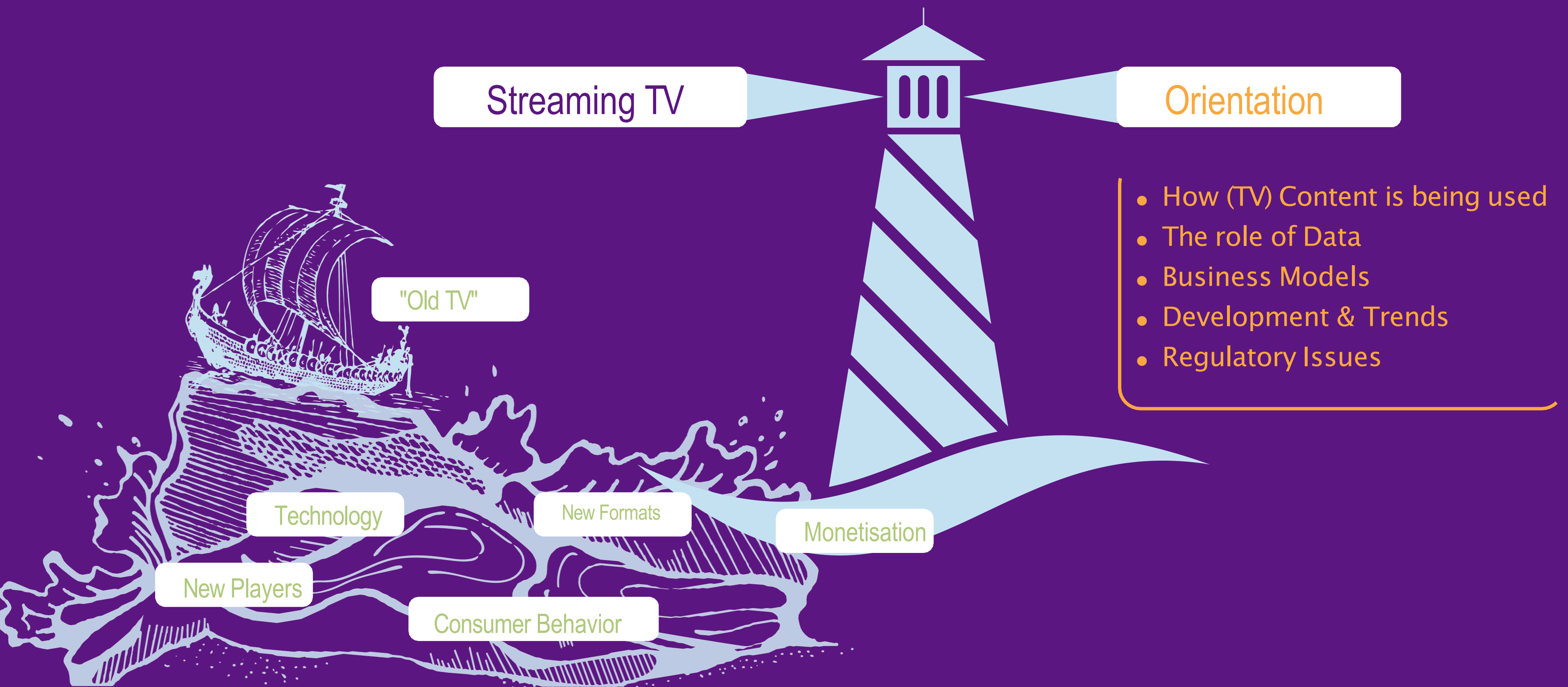
Streaming Redefined Television



Streaming Business:
New Ecosystem
of Distributors, Creators
& Gatekeepers

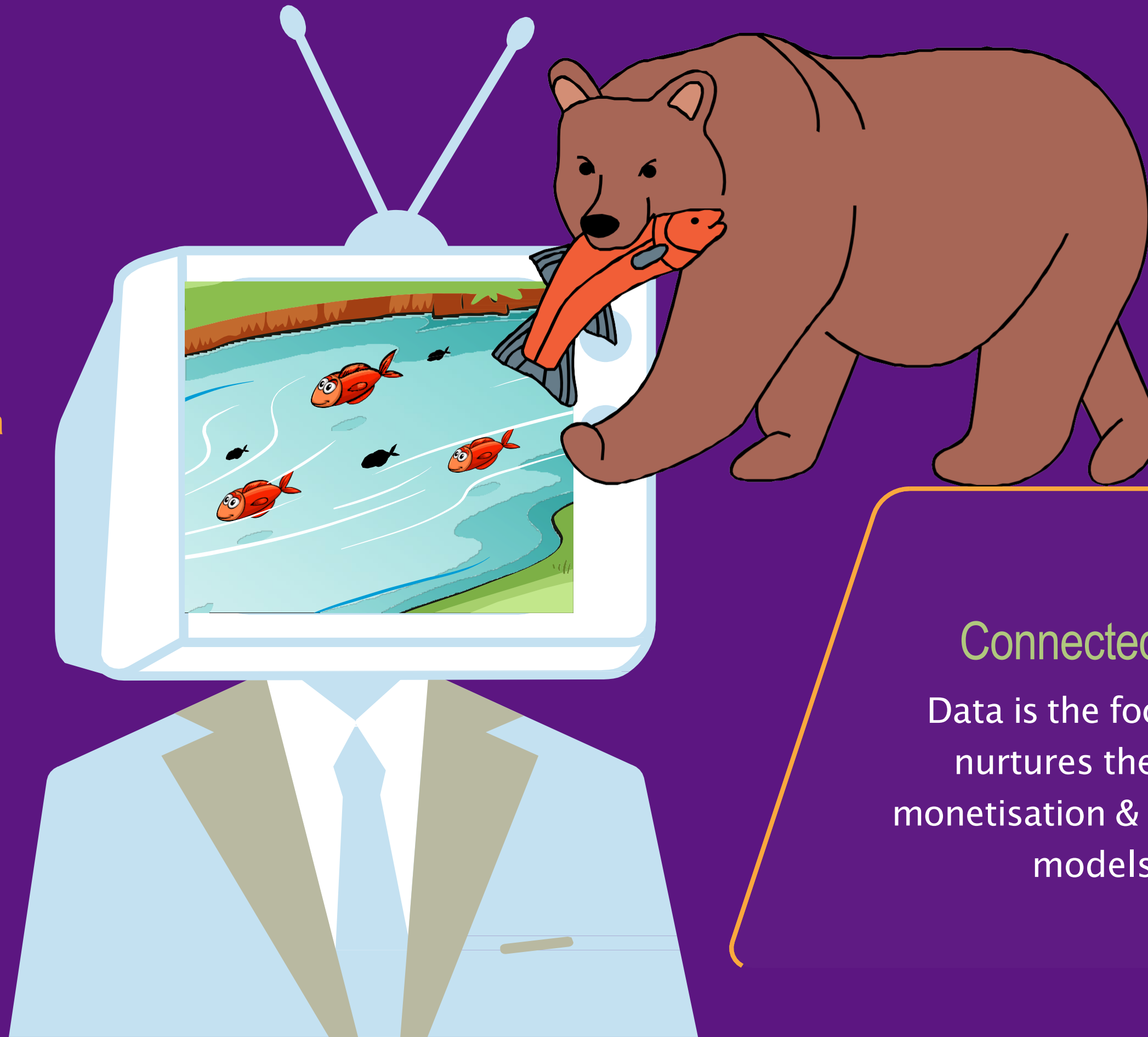


Television: The Great Uncertainty



It is all about the DATA

The Streaming ecosystem enables
Connected TV = access to Upstream **Data**



Connected TV

Data is the food that
nurtures the new
monetisation & business
models

Netflix

Turning Data into a
Customer Loyalty Tool



Curated Content

- Use data relentlessly to improve content curation & recommendation
- Niche is cool

Strong Brand

- A "sexy brand" with loyal subscribers who pay premium sub fees
- Brand extension possible to other (media offers)

Netflix

The Content Bubbles for Everyone?



Who takes over ?

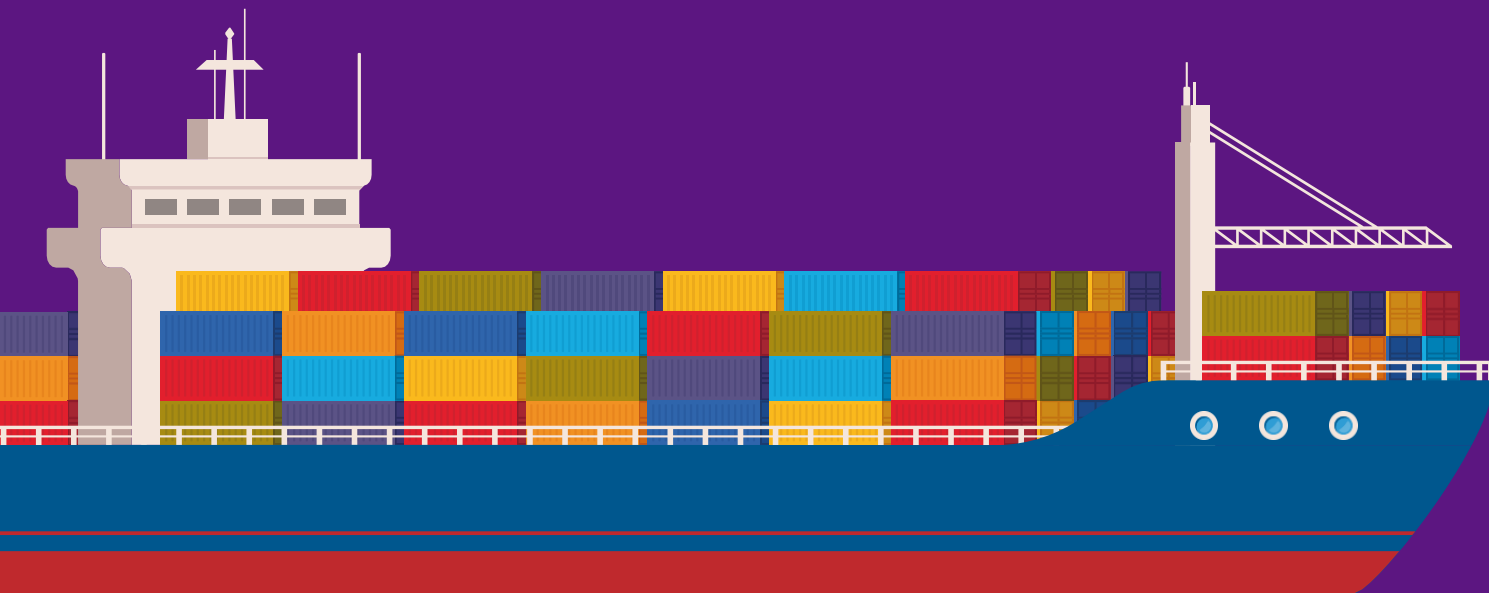
- Buyer from Middle East or Asia?
- Ideological Blocs

Niche = Living in the Bubble ?

- How to ensure content diversity and yet have a common narrative for a society?
- Personalization = **Individualisation**

Amazon Prime

Use all Data to sell more



TV: a glittery customer acquisition tool

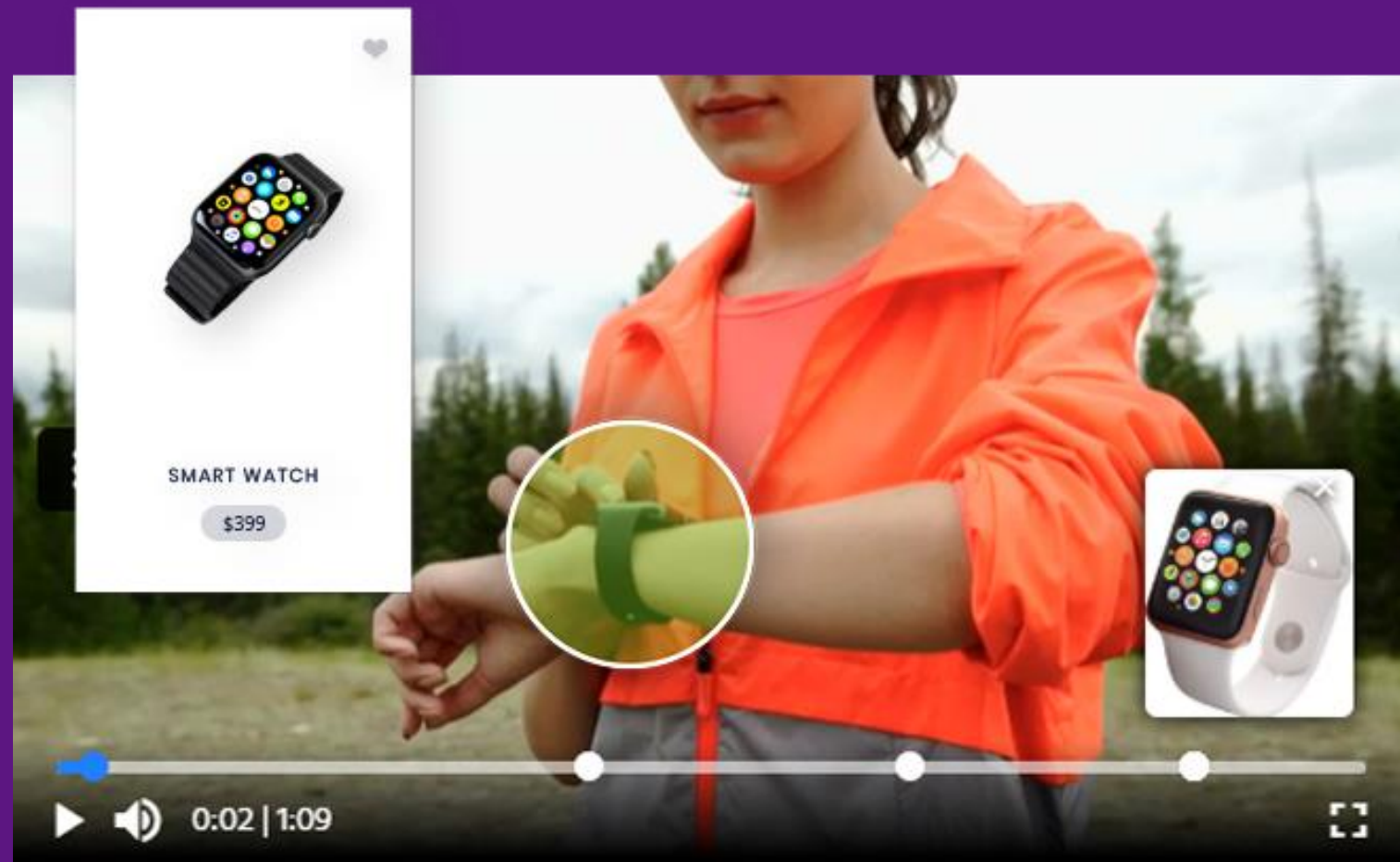
- Use content to attract and understand customers
- Get all data to sell more products

Ultimate Gatekeeper model

- Example: Major Baseball League
- Content binds both customers and suppliers
- Build ecosystem to "own" the customer

Amazon Prime

(TV) Media as the Retail Outlet



The world is not enough?

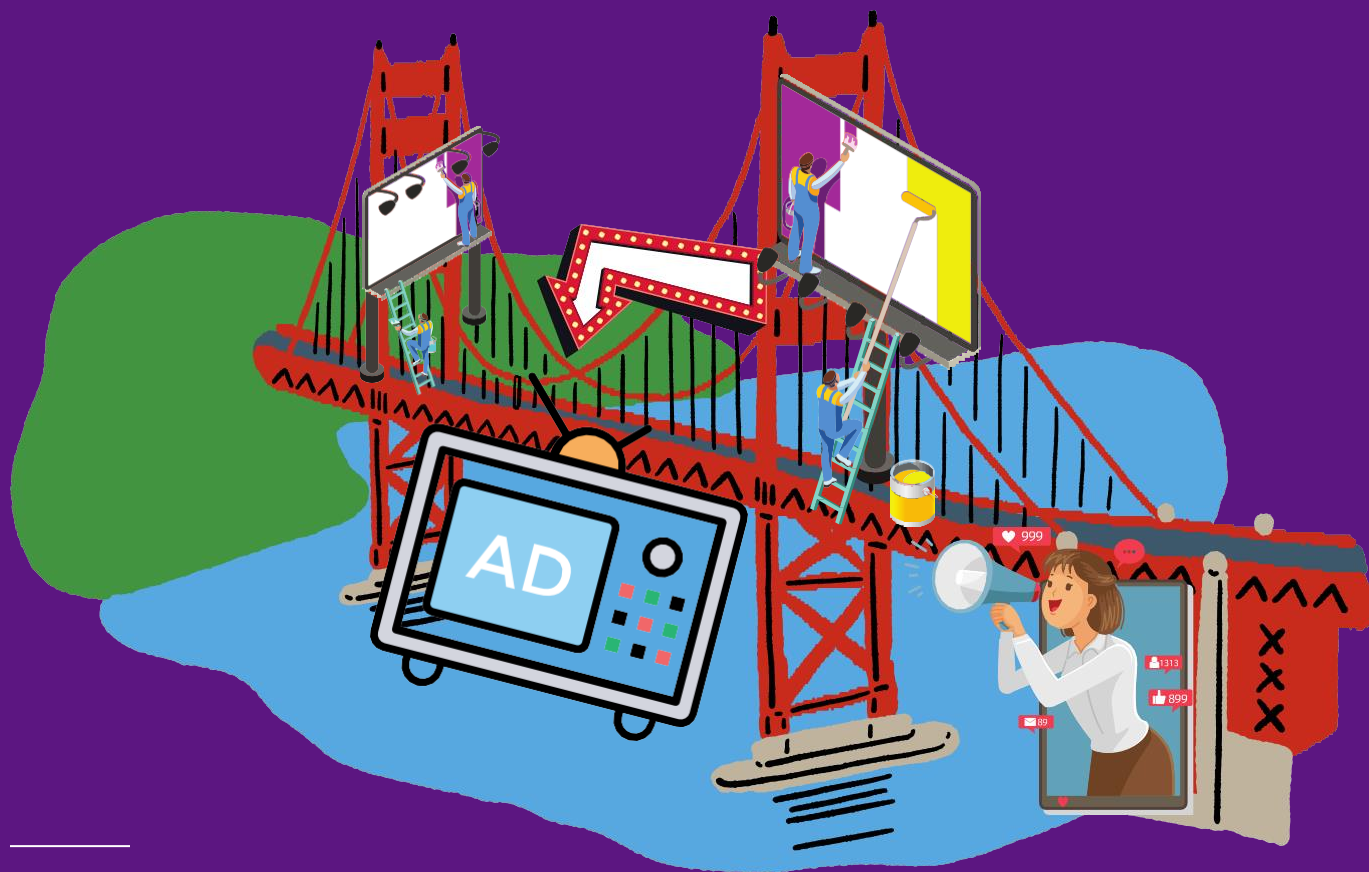
- Monopsony / Oligopoly
- Retail in Media / In-Stream Commerce
- Branded Channels

Curation = Recommendation = Commercialisation

- When TV Channel becomes Sales Channel
- Brand Content
- AI Recommended Commerce / Instream Shopping

Youtube Tv

The Data Giant
= The Advertising Giant



From ClownTV to Big Screen

- Video content sticks = lots of ad inventory
- All content is welcome as long as it goes virtual
- Data is the tool to sell more, expensive ads

Ultimate Gatekeeper model

- Own the marketplace for digital advertising
- Corner the Big Screen to have Pole Position
- If you want to advertise, you must use Google

Youtube Tv

Big Tech - Death Stars?



The Rich get Richer?

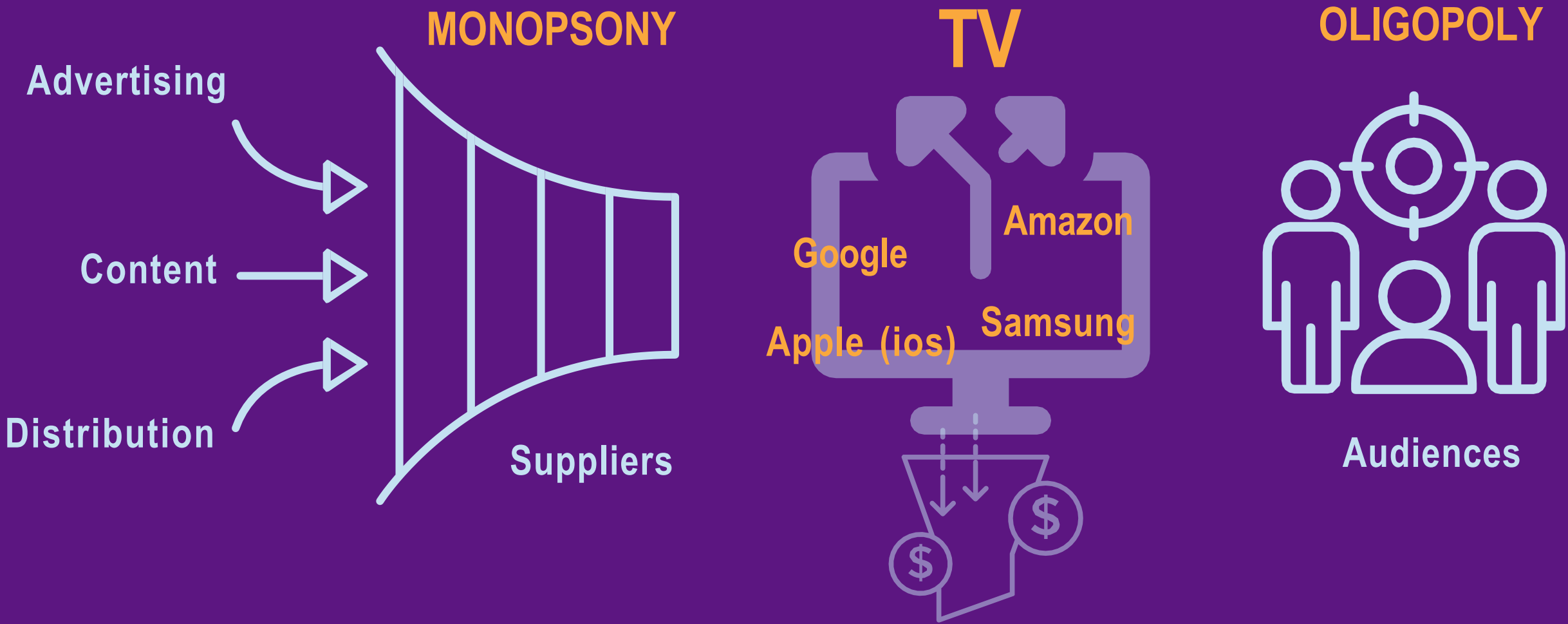
- Monopsony / Oligopoly
- Fight over the Living Room
- AI assisted personalized content & advertising

New Gatekeepers take control

- Big Tech enters the Living Room (**Market Concentration**)
- Ecosystems / Platforms that dominate entire markets
- Network Effect favors the winner-takes-it all and the-rich-get-richer models
- Content diversity suffers

IF Big Tech Takes Over TV

The TV Markets will become Monopsony and Oligopolies



Pluto Tv

Use Content & Data to funnel
Customers into other Services



The Comeback of LinearTV

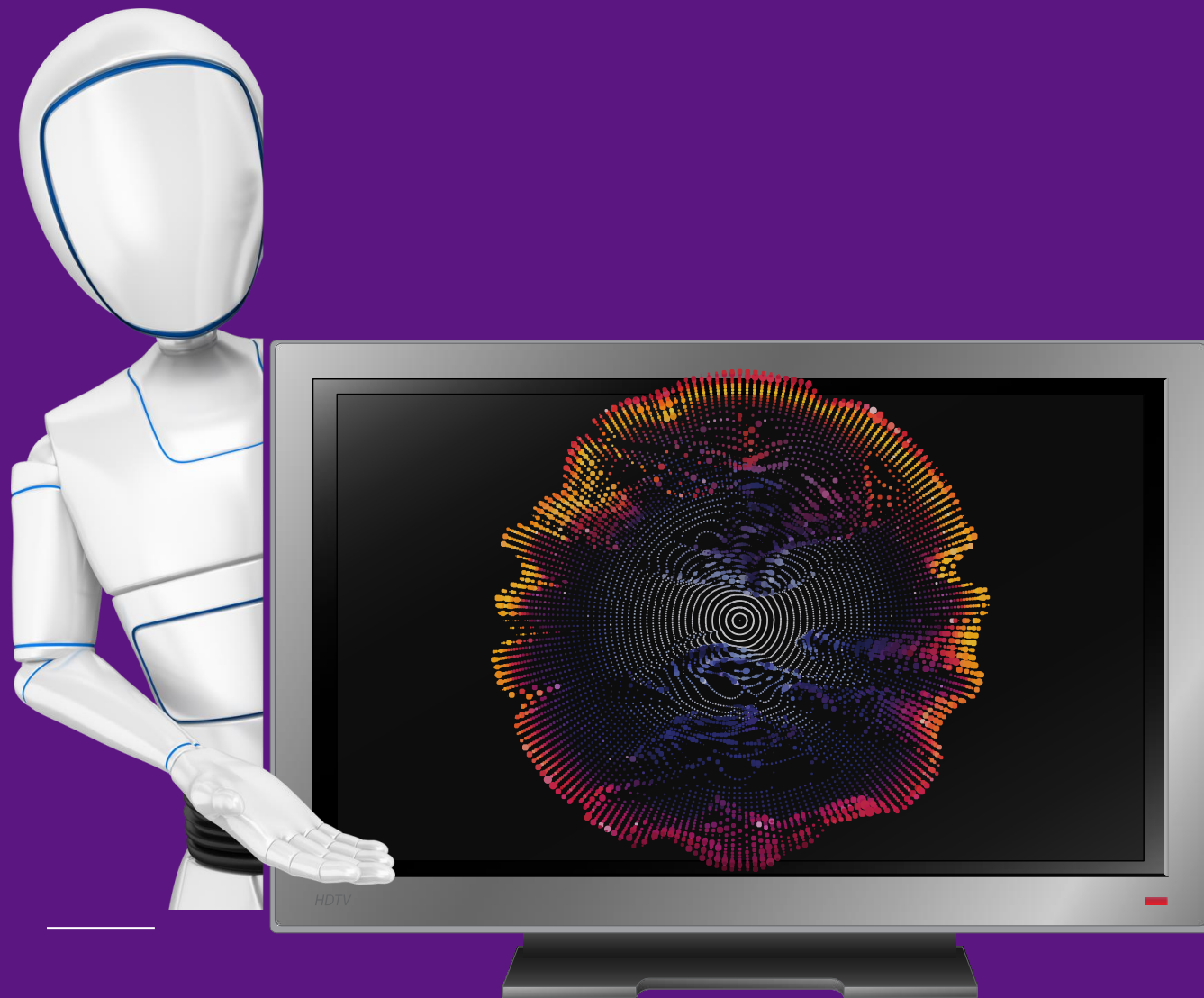
- Using data to optimize content and target ads
- Content must be free, "lean-back" experience
- Data is the tool to sell ads and move customers into other services

The FAST Model at its best

- Free Ad Supported Streaming Service
- Strategic customer acquisition tool, that pays itself
- Flexible programming

Pluto Tv

Who decides what we watch?



Is Content still King?

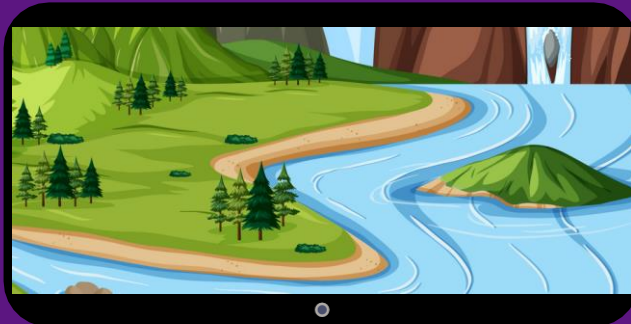
- Branded Channels
- Hollywood's Last Battle for World Domination
- AI assisted channel management & personalization

Content Bots or Editors?

- **Automation** of the entire Content Value Chain
- AI Managed TV Content & Channels
- Automated Content Recognition (ACR)

Samsung+ TV

When your Hardware
is the main Data Hub



The Trojan Horse TV

- Content to sell hardware
- Hardware to get data
- Data to monetize clients

Own the Screen

- Be the content gateway
- The device is the center of daily life
- Own the technical ecosystem (Gateway)

Samsung+ TV

Content only for those with Screen,
Profile & Money



Do we want to have Screens everywhere?

- Digital Divide (infrastructure & demographics)
- Bundle, Bundle, Bundle
- Super App

Digital Divide - even beyond the Screen

- **Fragmentation**
- Digital Divide
 - Technology
 - Demographics
 - Content (Bubble)
 - Affordability

Regulating Streaming

How to control a Mighty River System? Is putting in massive Gateways the Solution?



Fragmentation

Market Concentration

Individualisation

Automation

Commercialisation

If you regulate a river too much,
you end up with a boring, liveless channel.



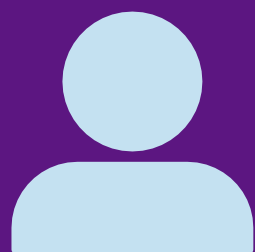
Safeguarding the Streaming Ecosystem

Nurturing a rich, diverse ecosystem while controlling the Ports, Boats and Rivergates



Regulate Platforms, Traffic, "Danger Zones" and Market Access to ensure diverse, local, widespread and edited content.

Thank You for your Attention!



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