2020 Media Futures
Delphi Survey Report

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Prepared by

Nordicity
Gabe Sawhney

Prepared for

OCAD University
Strategic Innovation Lab (sLab)

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About the Delphi Process

- "Delphi" is a type of survey method used to gather and analyze opinion, and identify or achieve points of consensus, among experts in fields that require a high degree of human judgment.
- Delphi has been defined as a "well-established foresight technique that involves repeated polling of knowledgeable individuals, feeding back … anonymised responses from earlier rounds of polling, with the idea that this will allow for better judgments to be made without undue influence from forceful or high-status advocates. The technique was developed so as to circumvent "follow the leader" tendencies of face-to-face exchanges, and other problems such as the reluctance to discard previously stated opinions" (*Towards a Future Internet – Delphi Survey Round 2 Results*).
- This 2020 Media Futures Delphi Survey serves to collect data from a broad array of local, regional and global respondents, to prioritize issues or drivers of change thought to be most important, and most uncertain, in their anticipated impact on Ontario's cultural media and related industries.

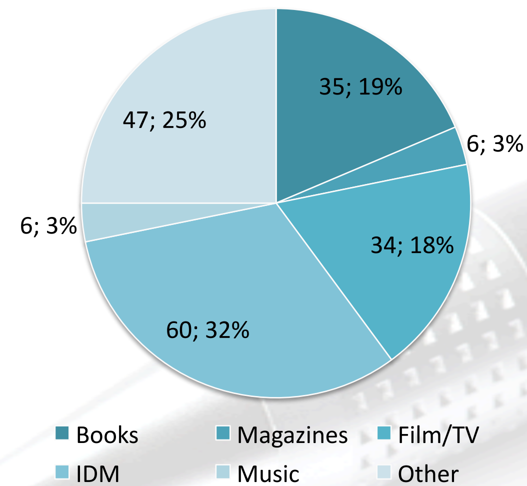
Methodology Employed

- The present engagement entails a two-round Delphi process.
- Round One was open from November 4 through November 9, 2010. Round One was accessible directly to a pre-registered group of respondents and also via an open, public link.
- Round Two followed from November 11 through November 15. Round Two presented the results of Round One where consensus was *not* reached and asked respondents to re-evaluate (and re-enter) responses.
- The goal of the engagement was to identify "critical uncertainties" in the evolution of cultural media industries over the next ten years.
- Accordingly, questions were generated to elicit consensus (or lack thereof) among survey respondents.
- For each identified issue, one question was asked with respect to the likely or expected evolution of that issue (the "uncertainty question"); and another question to gauge how critical it was to the respondent's organization and/or industry (the "importance question").

Who Participated?

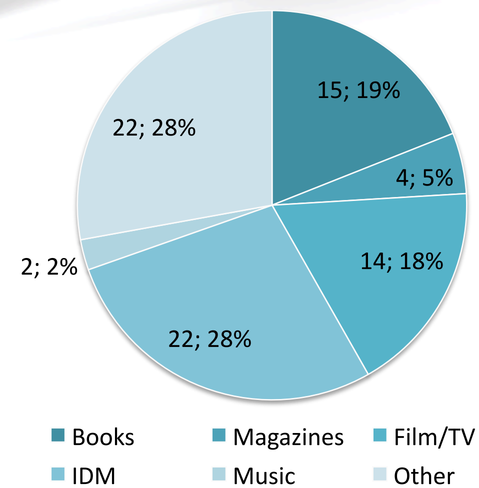
Round 1

- 92 usable responses
- Responses from 10 countries
- 41 responses from the publishing industries
- 34 responses from film and TV
- 60 responses from interactive digital media
- 6 responses from the music industries
- 47 responses from "Other related industries" (e.g. mobile)



Round 2

- 34 usable responses
- Responses from Canada and the United States
- 19 responses from the publishing industries
- 22 responses from interactive digital media
- 2 responses from the music industries
- 14 responses from film and TV
- 22 responses from "Other related industries"



Assumptions, Caveats and Calculations

Assumptions:

- We assume that "Outcome Uncertain" responses indicate uncertainty
- We assume that respondents to Round One who did not return a survey in Round Two would ***not*** have altered their responses.

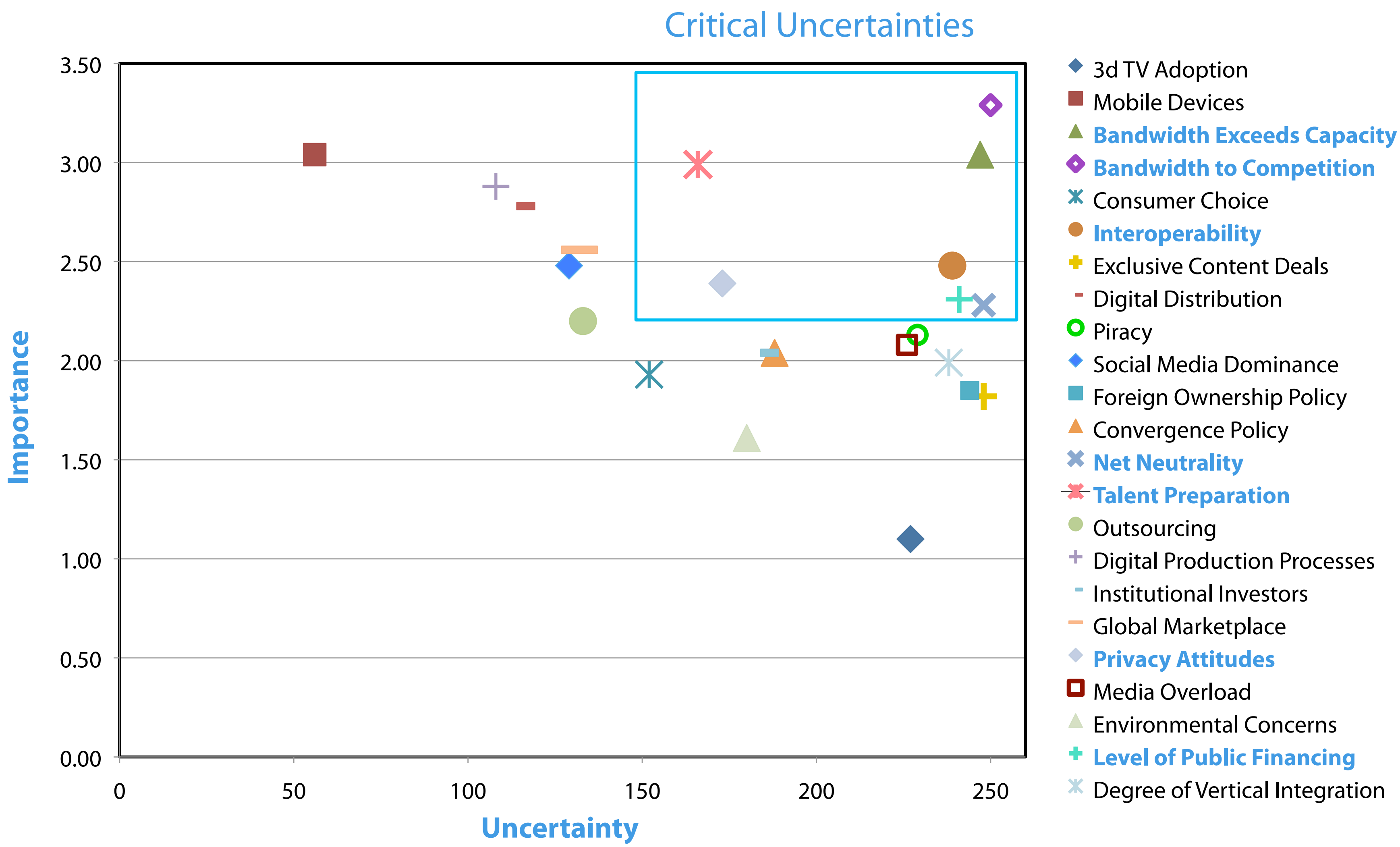
Caveats:

- No vetted "expert" panel was convened for this Delphi process. The survey was marketed to project partners and related industry organizations, and open to self-selecting respondents
- Effort to balance representation from industry sectors was made via marketing destinations
- Due to a relatively low level of response in Round Two, final calculations are based on an aggregate of the two rounds

Calculations:

- For each question, two figures are calculated: an Uncertainty Score and a Importance Score
- The Uncertainty Score is a weighted average of responses to the "likelihood" questions where higher scores indicate a greater degree of uncertainty. This figure was calculated based on the responses' deviation from the middle, 'uncertain' answer. The maximum possible score for uncertainty is 250.
- The Importance Score is a weighted average score per respondent where a higher number indicates a greater level of importance.
- Those issues that received an Importance Score of greater than 2.25 ***and*** an Uncertainty Score of greater than 150 were deemed to be "Critical Uncertainties"

Which are the Critical Uncertainties?



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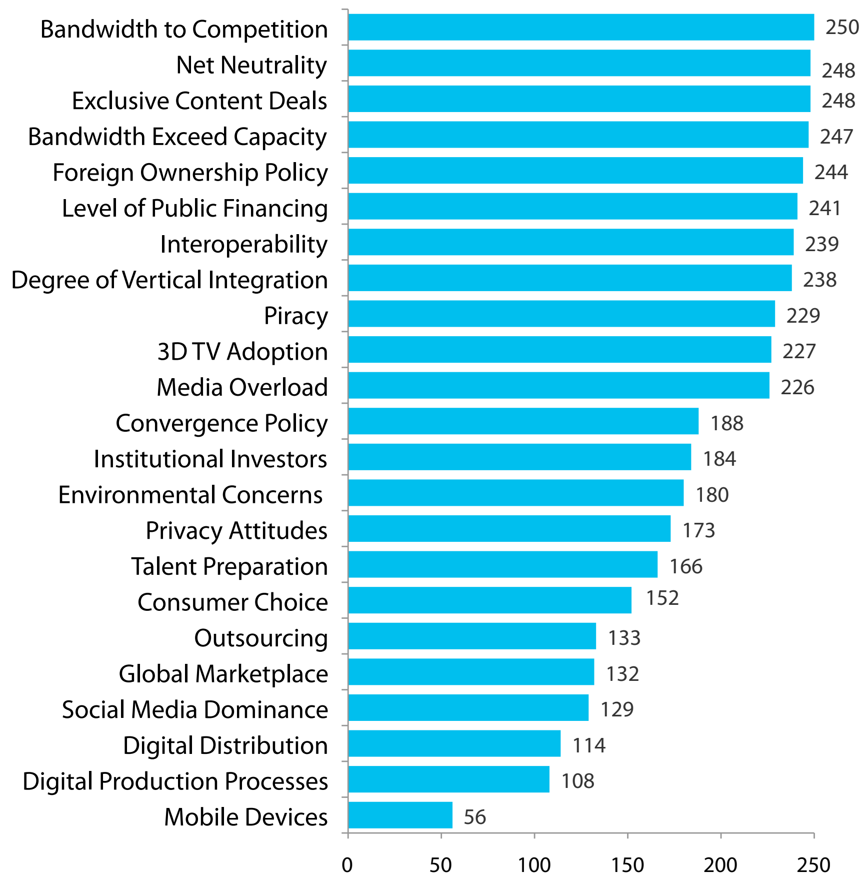
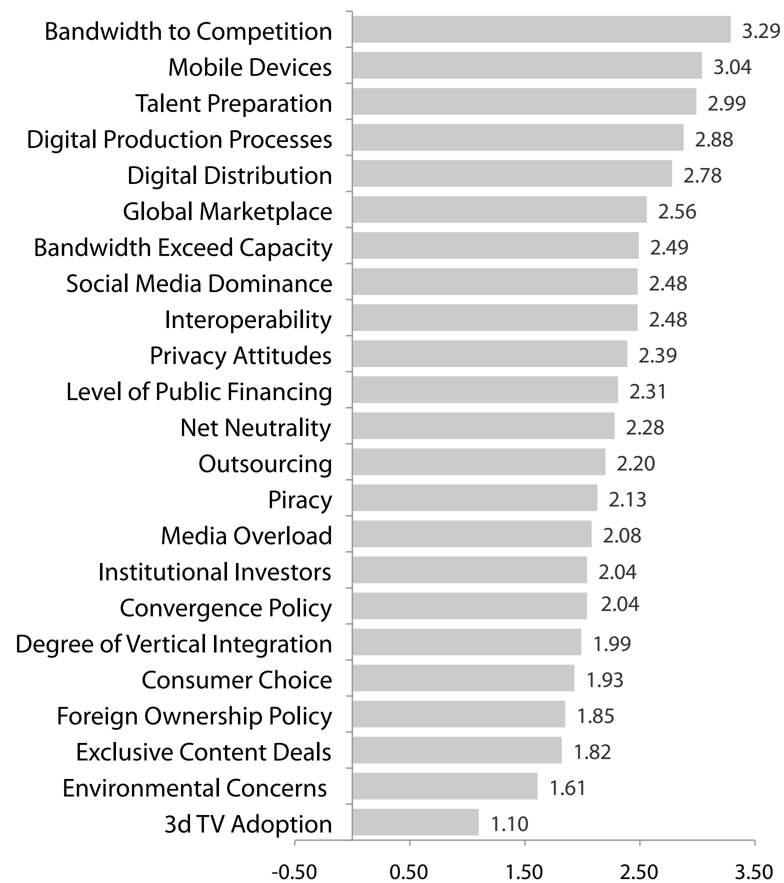
Summary of Uncertainty and Importance

Uncertainty Scores by Question



Importance Scores by Question



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Additional Areas of Critical Uncertainty

Other areas of potential critical uncertainty identified by respondents through free text comments include:

- Effect of international cultural customs on media production
- Role and impact of location-based media
- Role of “angel investment” in media
- Willingness of consumers to pay for media (thus the ability to monetize digital media)
- Role and importance of wearable technologies
- Changing nature of the computer
- Impact of shifting (i.e. aging) demographics
- Territorial-based vs. global marketplaces
- Consolidation of distribution channels (e.g. iTunes, Amazon)
- Impact of unequal distribution of technology across the world
- Role and importance of non-professional (i.e. user-generated) content
- Sustainability of Canadian content regulations and policy

Conclusions

The Delphi process revealed the following
Critical Uncertainties (in rough descending order):

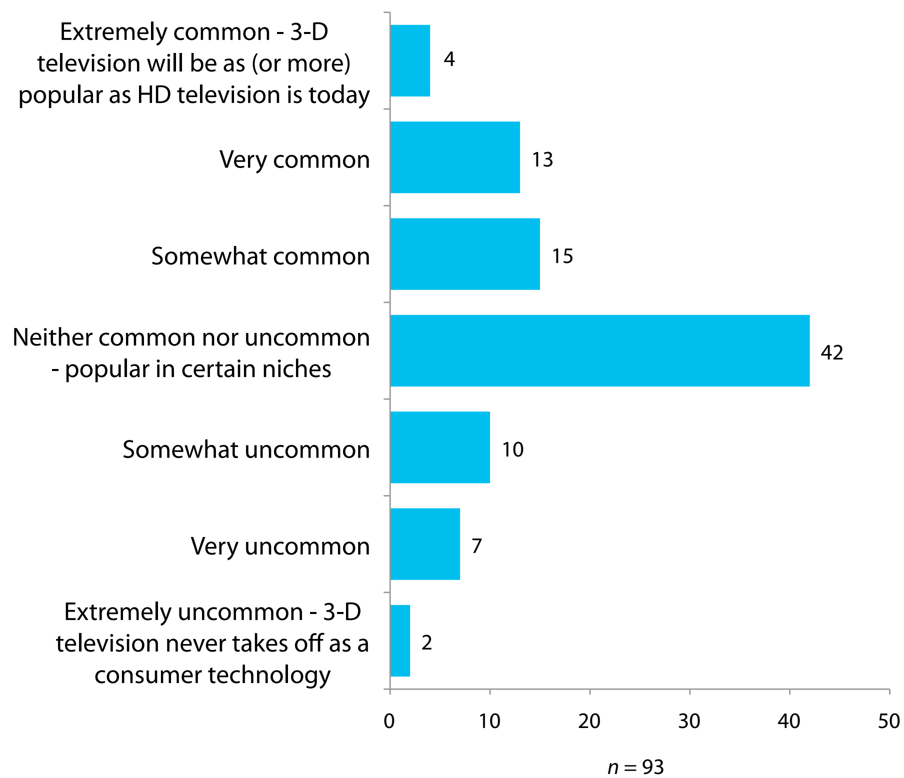
- Bandwidth's role in regional/global competitiveness
- Bandwidth needs exceeding capacity
- Talent preparation
- Device and software interoperability
- Level of public financing
- Network neutrality
- Attitudes towards privacy

Appendix: Individual Questions

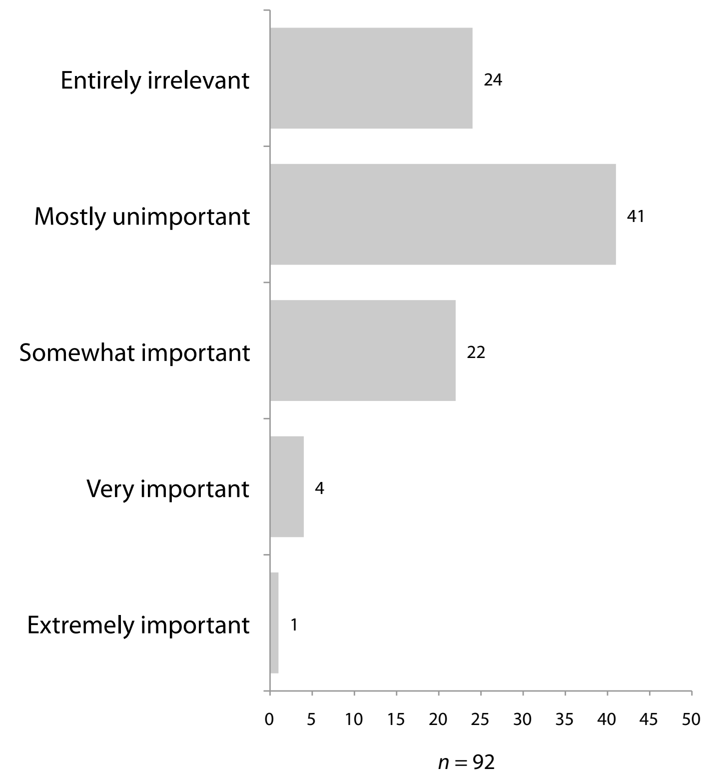
1. 3-D Television Adoption

How widely-accepted and commonplace will 3-D television be, by the year 2020?

Uncertainty



Importance



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Uncertainty Score: 227
Importance Score: 1.10

1. 3-D Television Adoption

How widely-accepted and commonplace will 3-D television be, by the year 2020?

Selected Comments

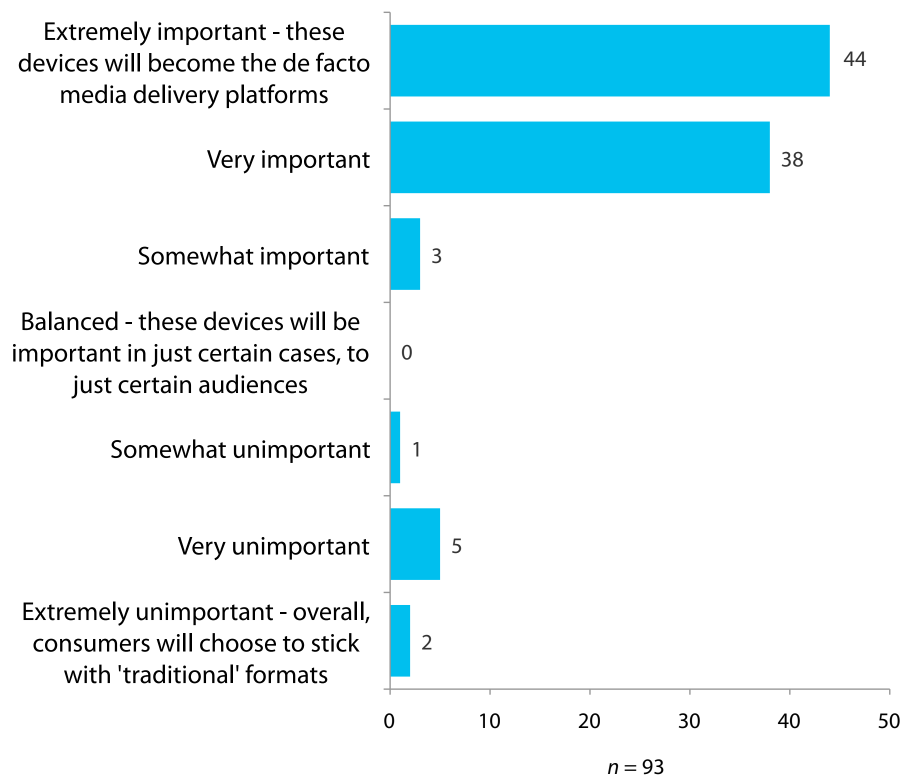
- Investments in 3D on the production side are beginning, and will be driven not only by consumers demand, but also by the need of manufacturers to replace the installed base with another generation of equipment both on production and consumption sides. The cost of 3D production technology will decrease as usual, allowing broader layers to produce in 3D and will ultimately be available on consumer video cameras.
- 3-D is a very old photographic precursor to immersive Virtual Reality. It's interesting that the movie business has chosen to test it publicly. Immersive VR however, is still the most interesting technological advance.
- Most responses are considering North American demographics. It's a big world with many millions of consumers that are from countries with large, young, growing, middle-class demos. It may not be as common as HD but there is no stopping technology. Programming is already being made for 3D. Software on 3D animation systems has 3D display plug-ins. 3D is here to stay and grow. Barring a global economic meltdown of course because 3D is not a necessary purchase.
- It's a fad. I don't see the appeal unless the tech gets better and glasses aren't required.
- Due to the medical issues as it pertains to exposure of S3D at the preschool and school age broadcast environment, I cannot foresee S3D as having a major impact on the production of broadcast animation.
- My business in looking at digital technology and content innovation. If 3-d television becomes common; new content emerging from this platform will be relevant to my field.

Uncertainty Score: 227
Importance Score: 1.10

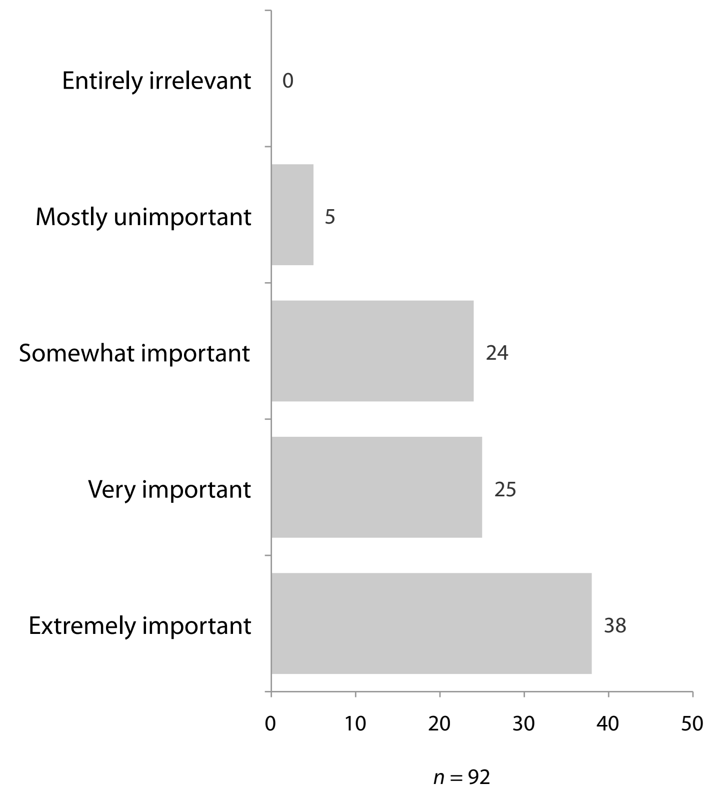
2. Role of Mobile Devices

How significant a role will mobile devices (including phones, tablets, eBooks and similar devices) in overall media delivery?

Uncertainty



Importance



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Uncertainty Score: 56
Importance Score: 3.04

2. Role of Mobile Devices

How significant a role will mobile devices (including phones, tablets, eBooks and similar devices) in overall media delivery?

Selected Comments

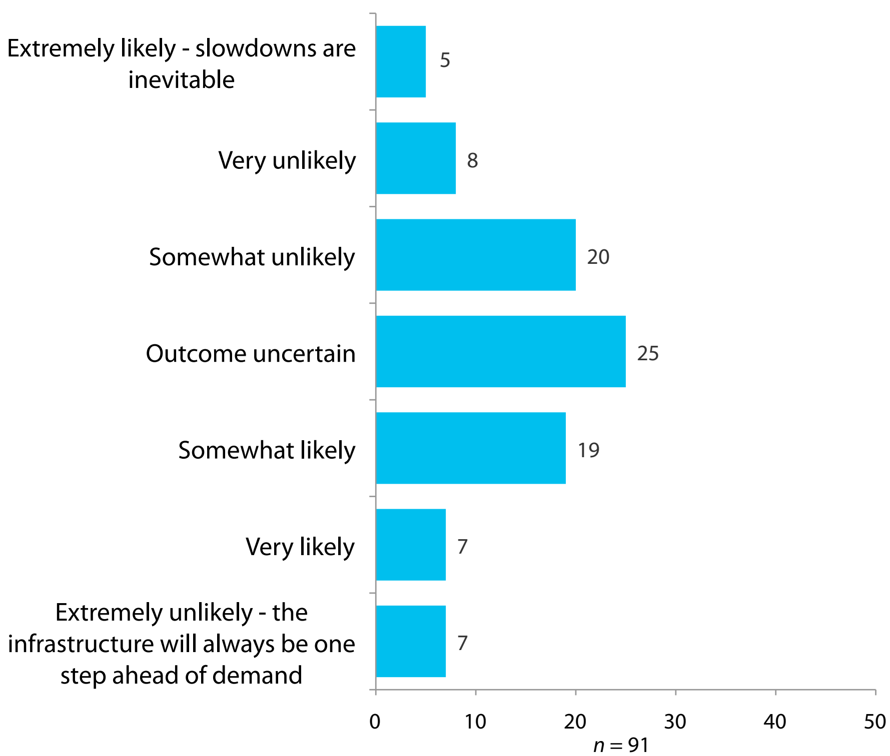
- Mobile would appear to be the fastest evolving mode of media delivery and, because of the low price point, content demand for this platform will likely continue to expand at an astronomical rate.
- Mobile is already here. It will only expand and become more a part of everyday life.
- Important for we are trying to reduce our carbon emissions and overhead, so we have reduced business travel and have gone to tele-broadcasting meetings.
- We are currently not in this space, but with changes to the CMF, we are being forced to develop for two platforms.
- Mobile devices will likely become primary delivery platforms for media, but I don't think we'll see traditional television view, movie theatres, books, etc. completely disappear within 10 years (if ever).
- The increasing relevance of mobile devices for individuals cannot be overstated… As a cultural medium, they offer a platform that is completely customizable to the individual, yet able to relate to and reach billions of others.
- In my business it will matter for collaboration and learning. These processes will become more distributed and mobile.
- Remember that the mobile reality is something that has been over 10 years in the making... The devices are finally at the point where the mass market can use it without usability issues. There is (and looks to be increasingly) healthy competition amongst manufacturers and operating systems which will lead to continued innovation, especially in the usability area.

Uncertainty Score: 56
Importance Score: 3.04

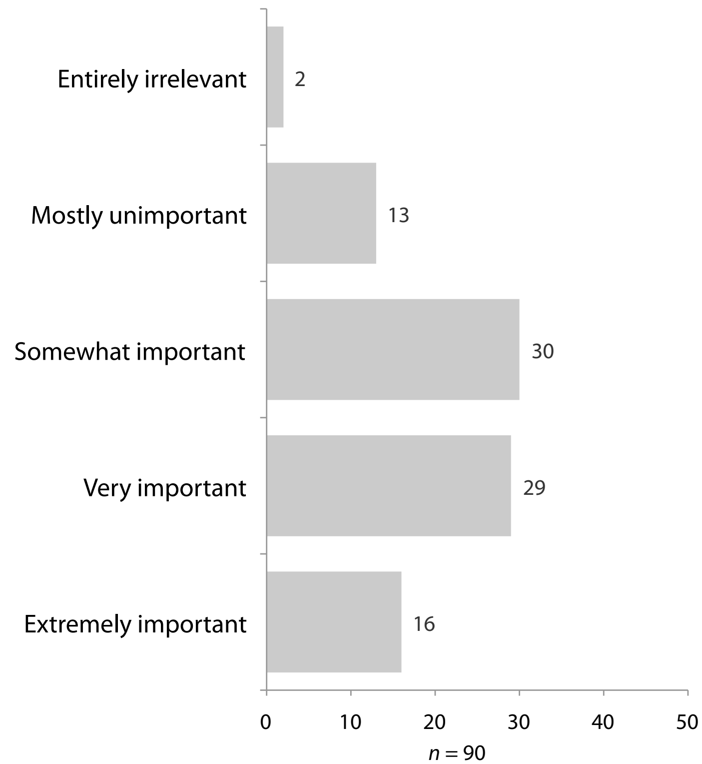
3. Bandwidth Limitations

How likely is it that by 2020, the demand for bandwidth (e.g. for video streaming) will exceed the capacity of infrastructure development, resulting in a general Internet slowdown?

Uncertainty



Importance



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Uncertainty Score: 247
Importance Score: 2.49

3. Bandwidth Limitations

How likely is it that by 2020, the demand for bandwidth (e.g. for video streaming) will exceed the capacity of infrastructure development, resulting in a general Internet slowdown?

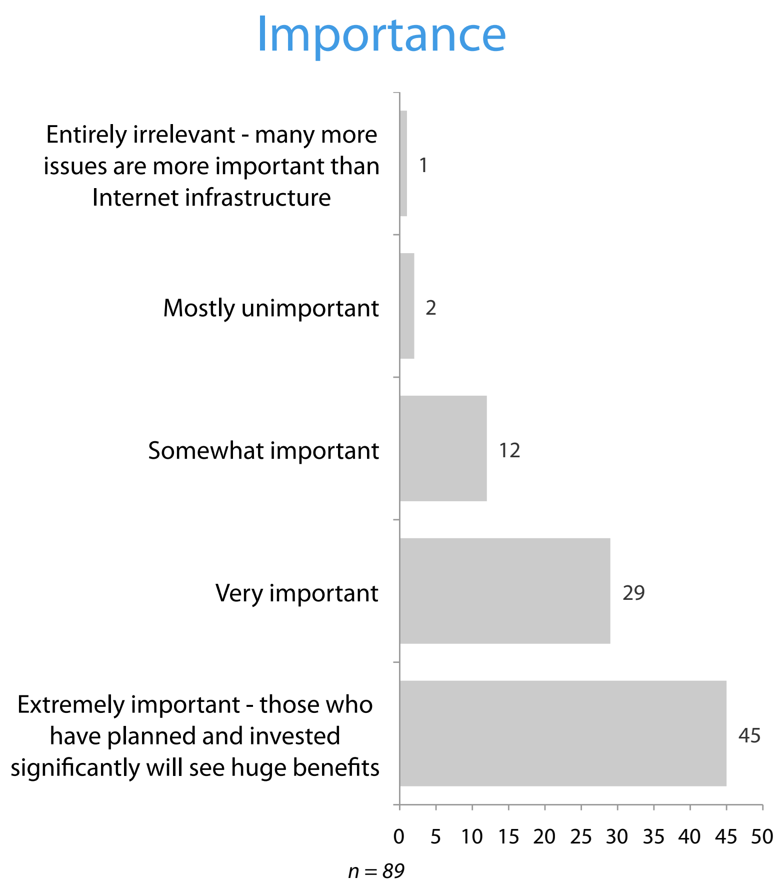
Selected Comments

- Taking my product on line is critical to its success. Commoditization requires bandwidth and penetration of diverse markets.
- We need to be aware it might happen, but it won't.
- Between unused/untapped bandwidth, undiscovered bandwidth, and the steady race around compression, there's little likelihood of any real shortage.
- Slowing of the Internet probably won't happen. Access to "faster" infrastructure will be made out of reach.
- Available bandwidth directly relates to the capacity of creators to innovate and users to experience. Creators will always find a way to push technology beyond its capacity. It is the nature of their journey.
- The problem is with suppliers trying to protect legacy systems. If new suppliers are not allowed in then bottlenecks could arise and it would inhibit the development of distributed/mobile processes in my business.
- Access to content; and bandwidth are critical issues now in certain unrepresented regions in the North (ie: Nunavut) for example and leads to a imbalance of distribution of bandwidth. Infrastructure exists widen bandwidth to meet the demand - but at what price?
- When the network slows down, work slows down.
- When we talk about infrastructure for the Internet we must distinguish between backbone (where there is lots of capacity) and last mile (where there is a serious under-investment, particularly in Canada). Unless there is a significant regulatory and structural change, I believe we will see last mile investment in Canada continuing to lag our competitors, creating serious problems in developing local markets for high bandwidth services over the Internet.

Uncertainty Score: 3
Importance Score: 2.49

4. Relationship of Bandwidth to Competitiveness

By 2020, how important will access to reliable, affordable bandwidth (both wired and wireless) be to countries/regions globally, in trying to attract investment & talent?



Uncertainty Score: 250
Importance Score: 3.29

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4. Relationship of Bandwidth to Competitiveness

By 2020, how important will access to reliable, affordable bandwidth (both wired and wireless) be to countries/regions globally, in trying to attract investment & talent?

Selected Comments

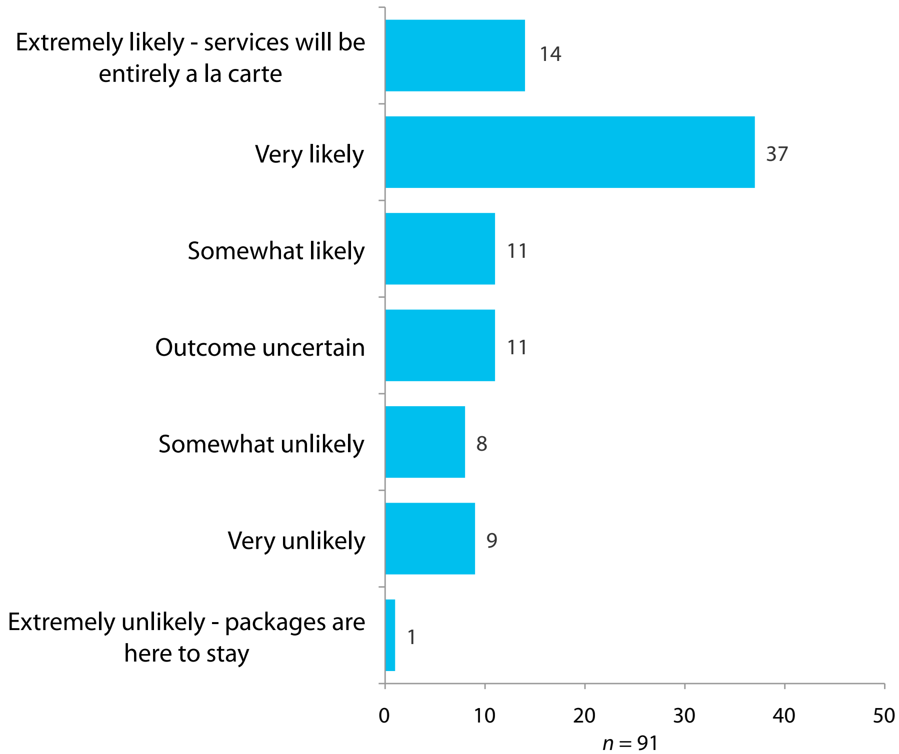
- Without wireless/wired bandwidth, kiss your communication and distribution tools goodbye.
- This goes without say that the next generation of content creators are already fully plugged in through wireless 24/7. Access to this is obviously crucial to developing countries trying to attract talent, etc.
- We need to be competitive, not the fastest. We need to be able to create and access using an infrastructure that allows us to experience the digital world as others do. That said, access to research institute backbone networks will need to continue to allow for experimental use.
- Internet infrastructure needs to grow with ability and training to utilize it (computers, training, industry standards).
- If you had a "vital" category I would have selected it.
- The price of talent, and incentives for country/region development will outweigh bandwidth issues. Outsourced transient technological workers may shift locations based on affordable bandwidth which will change how companies structure their talent team.
- This is already a concern when traveling and doing business globally. There is becoming an expectation to access the internet and to have to work. This is a major issue in terms of dealing with the digital divide and accessibility issues worldwide.
- Reliable, affordable bandwidth will be accessible in many countries — similar to mobile. It will not be enough to attract investment and talent because bandwidth will not be an adequate competitive differentiator.

Uncertainty Score: 250
Importance Score: 3.29

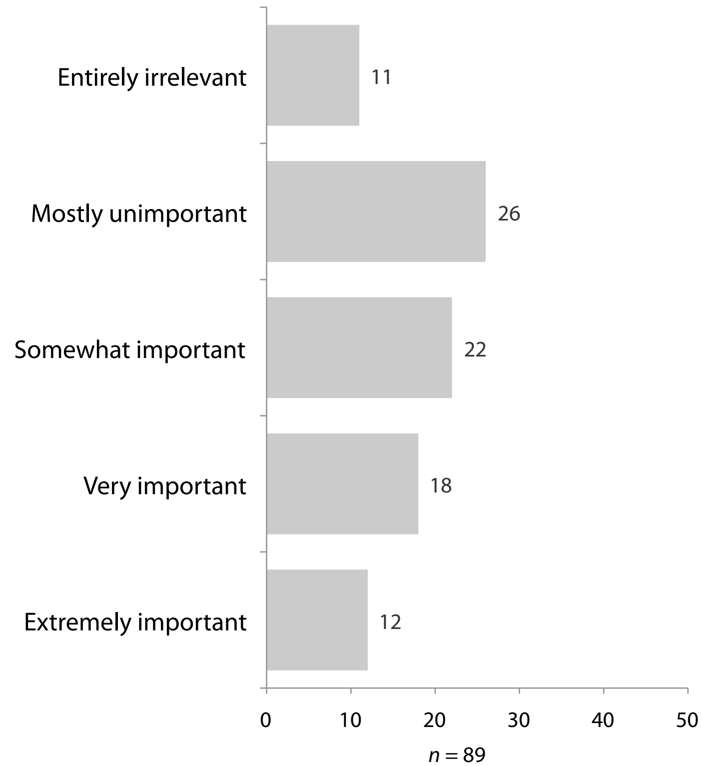
5. Consumer Choice and Plan Flexibility

How likely is it that by 2020, broadcast distribution undertakings (e.g. Rogers, Shaw and Bell) will offer customers the flexibility to customize their programming on an à-la-carte basis (rather than bundling content offering together in packages)?

Uncertainty



Importance



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Uncertainty Score: 152
Importance Score: 1.93

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Selected Comments

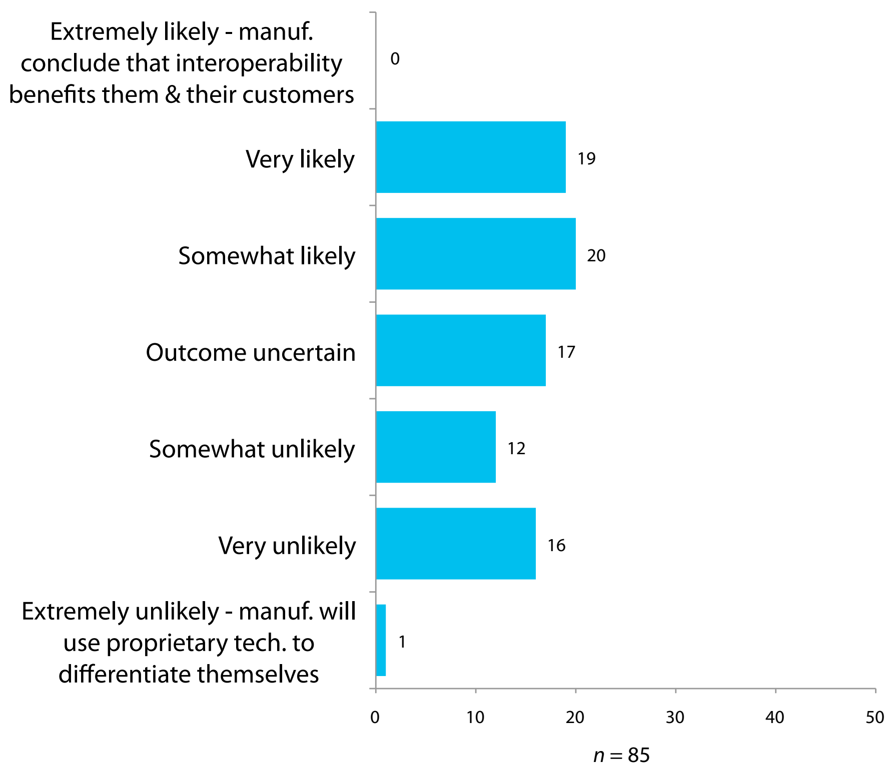
- I have switched providers 3 times this year. Flexibility is coming quickly and access outside the country is becoming the norm.
- It will be a major issue. A la carte cedes too much control to the consumer.
- Content packaging is here to stay, although it does not make me happy, abundant consumer choice would mean the death of the content provider business model, which is conservative.
- We receive the least amount of service for the most expensive delivery, and Canadians are becoming increasingly aware of this.
- Several distributors are already moving to offer their content over the Internet, and such content are not being bundled as with channels. Some new competition is starting to appear (Shaw direct in Rogers territory, Ontario) - this will force distributors to unbundle offerings.
- Consumer choice is v. important. What is unclear is whether the concept of channels will continue to exist for mainstream users. Users don't care what channel paid for their experience, they just want efficient access to it. With online distribution, the channel organizational model breaks down.
- Price and simplicity are both attractive attributes of service packs, but people will still access internet no matter what.
- "Buffet style" content delivery will always be an option in audience content consumption. It may be a mixed model; where "buffet" and "a la carte" can be combined for greater "value" for the audience.

Uncertainty Score: 152
Importance Score: 1.93

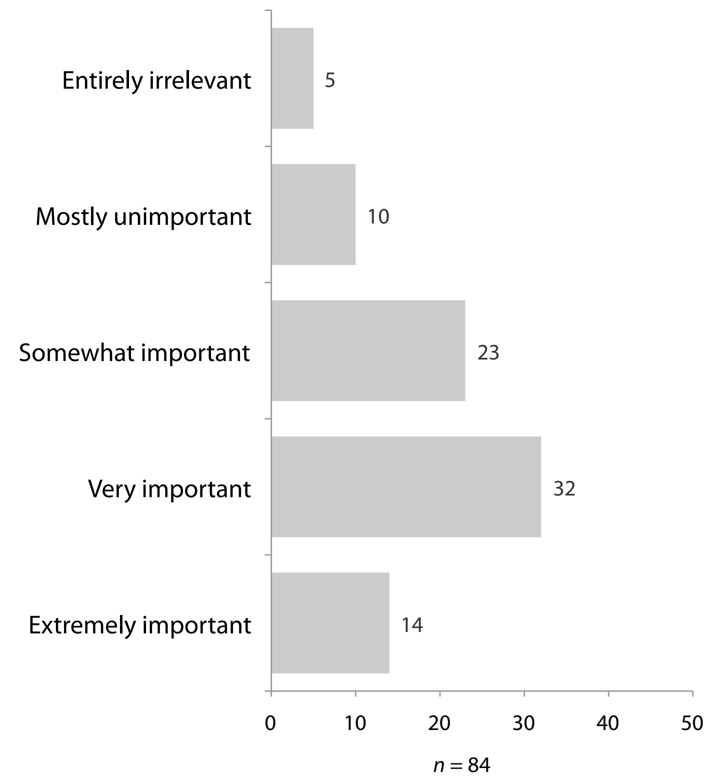
6. Interoperability of Devices and Software

How likely is it that by 2020, manufacturers will make their products (both devices and software) completely interoperable rather than resorting to "walled gardens"?

Uncertainty



Importance



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Uncertainty Score: 239
Importance Score: 2.48

6. Interoperability of Devices and Software

How likely is it that by 2020, manufacturers will make their products (both devices and software) completely interoperable rather than resorting to "walled gardens"?

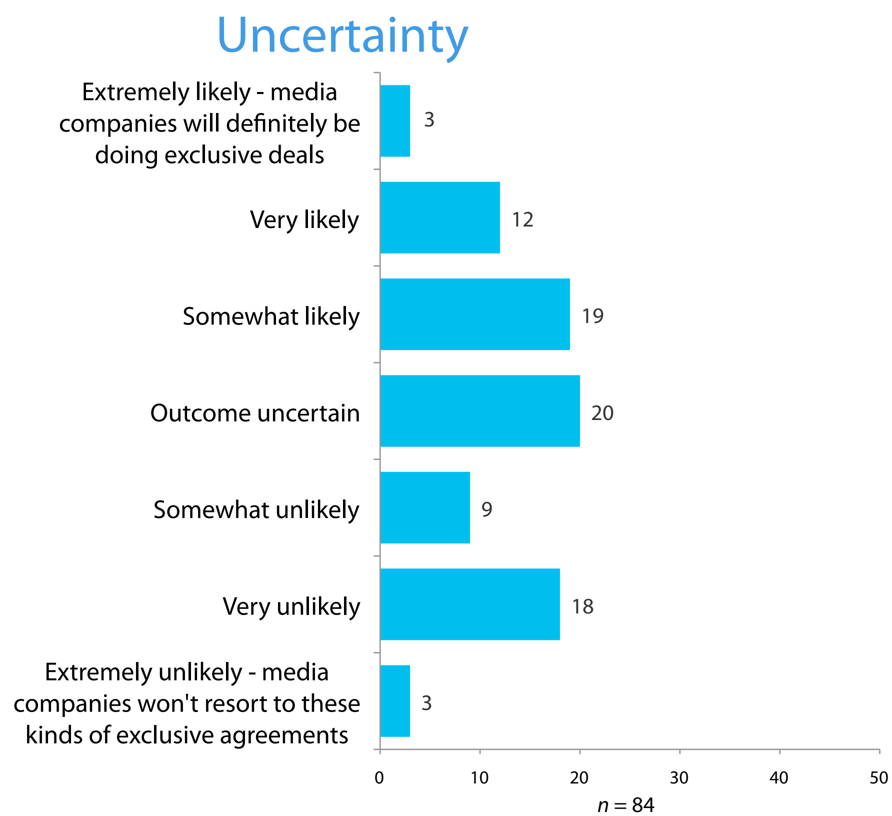
Selected Comments

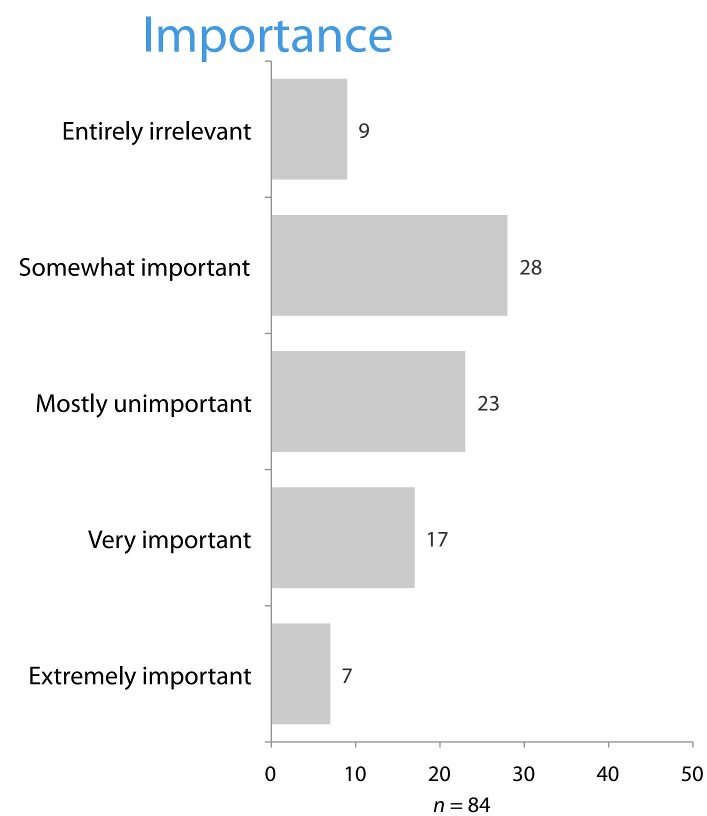
- Competitiveness in our current business model framework requires some degree of proprietary boundaries. That will change, but slowly.
- The public will hack it so the companies will be forced to drop the walls - but agree that platinum gardens will exist for those who want best quality experience.
- If a consumer buys an ebook, they will expect to be able to read it on whatever device /software they want.
- As there is likely to be proliferation of technologies in addition to increased service and entertainment offerings, it seems likely that the proportion of walled garden devices and products will stay +/-constant.
- Even after the coalition to support the Android platform, members are developing their own tools to differentiate and control the services their users have access to. There is an incredible financial incentive for the major players to invest in proprietary technology, when they are in a position of dominance.
- Control = power = resources.
- People find ways to make things work for them, ahead of industry methods of working. The ability to put forth a few standard book formats instead of 5 or 6 different formats will save time and money.
- The issue is important for creators and marketers because interoperability helps reach mass audiences more efficiently. However manufacturers will decide that they are better off interoperable because it allows them to tap into a working ecosystem no different than everyone in a country using the same electrical plugs.
- It will be half and half. This question is weighted. It won't be completely interoperable I think. That never exists. But walled gardens are also not forever. The answer to this question would vary on a case-to-case basis depending on the industry or even parts of an industry.

Uncertainty Score: 239
Importance Score: 2.48

7. Exclusive Distribution of Content

By 2020, how likely is it that exclusive distribution deals with certain platform companies (e.g. integrated media companies) will be the norm?





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Uncertainty Score: 248
Importance Score: 1.82

7. Exclusive Distribution of Content

By 2020, how likely is it that exclusive distribution deals with certain platform companies (e.g. integrated media companies) will be the norm?

Selected Comments

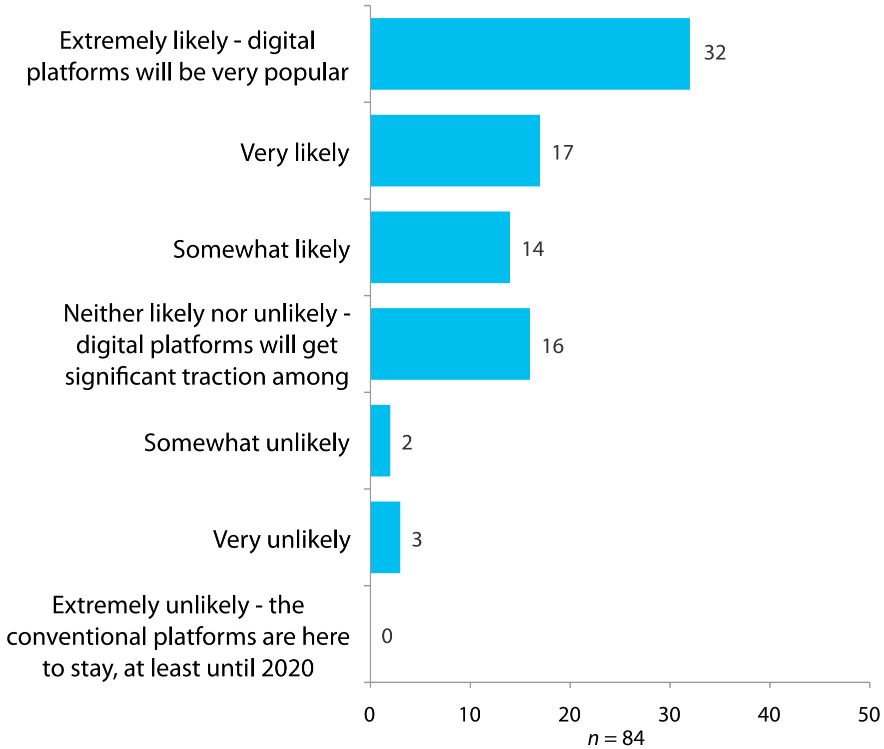
- This will be one of the ways "ownership" can be preserved.
- This already is the case as seen with Netflix. Exclusive "first windows" for content can be beneficial to distributors in pushing up the price on content.
- Exclusive distribution is still a theory and not a practice. Large providers are not interested in providing funding or upfront payments on material that has not already been broadcasted traditionally. Further, they look for the quick and easy approach, so independent production has dropped as distribution "silos" have further segmented the market to a few "branded" channels globally.
- The specificity of content, its uniqueness and high value added will be critical to gaining sufficient margins and market share, which means that everyone will still try to broadcast as much as possible and use pay per view rather than platform exclusivity. Even Apple accepts money from PC platform users.
- It goes against the logic of network effects as a basis for business, may be that by 2020 that will be understood by media conglomerates.
- As an educator, I would consider this to be destructive to the Internet, so would fight it on principle.
- This type of programming maintains a certain amount of control within these companies but does not respond to the way that consumers access their media. It is to their detriment that they maintain these severe boundaries but it is unlikely they will change this type of programming in the near future. Although in saying this, they may have no choice but to change as the audience will find and watch their media where they [the audience] are most comfortable and this may force change on the companies.

Uncertainty Score: 248
Importance Score: 1.82

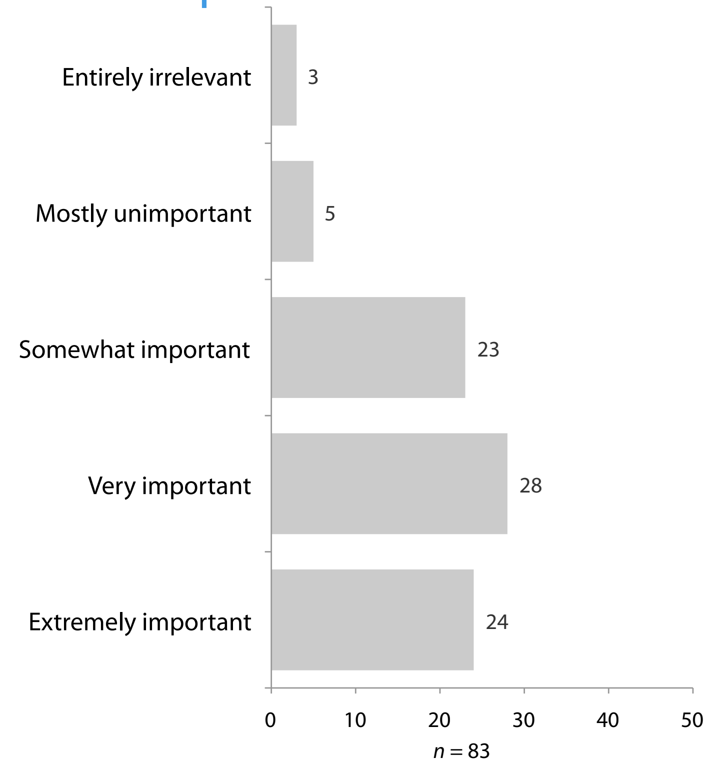
8. Digital Distribution of Media Content

What is the likelihood that, by 2020, digital distribution platforms (i.e. eReaders, iTunes, Netflix on game consoles, magazines on iPad, etc.) will be the dominant means of media delivery, as compared to conventional platforms (e.g. the printed book and linear broadcast TV)?

Uncertainty



Importance



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Uncertainty Score: 114
Importance Score: 2.78

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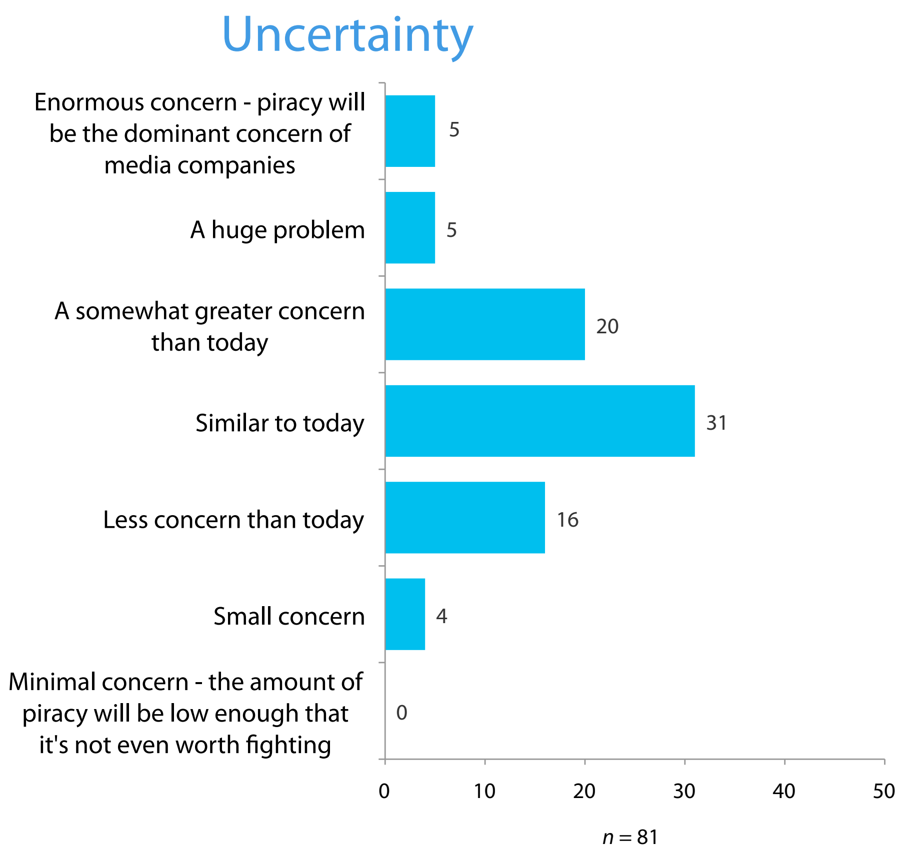
Selected Comments

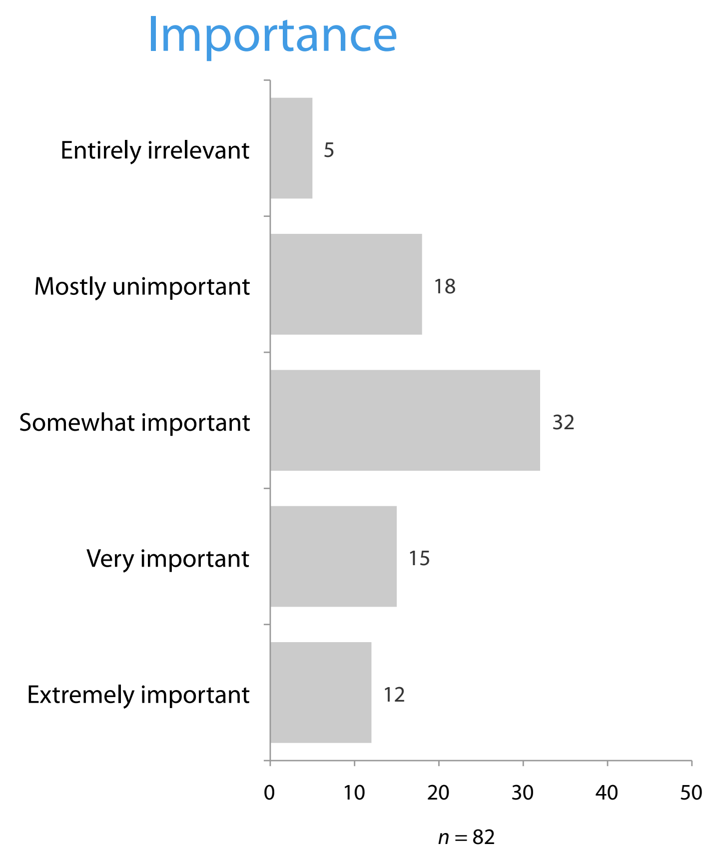
- We need to be able to deliver the appropriate content to these new format devices -- I envision multiple versions of the same product becoming the norm -- to suit the consumer demands. so a feature film will also exist as webisodes, a game, a making of doc, a shorter mobile-device version.
- Why use paper if you don't have to? Display tech will likely advance to such an extent that digital media may even appear as paper and provide the associated benefits of paper.
- We will add new media next to old media. Nothing is going to kill the book. Also, passive TV consumption is here to stay, yet both will have reduced audiences since they need to share consumers eye ball time.
- Multi-screen is inevitable and it is likely that distribution deals and advertising pricing based on multi-screen and time-shifting will happen in the next three years. Nielsen is already working on this and the hold up is really antiquated TV viewing metrics.
- As a user, I made the transition in the spring. My HD screen was already connected to a PS3, an XBox 360, a PC, and the Internet. .. As HD screens are increasingly paired with web enabled hardware, the entertainment experience will be transformed.
- In 10 years, we've already seen huge fragmentation of audience across multiple "surfaces" and I've no reason to believe that this will increase.

Uncertainty Score: 114
Importance Score: 2.78

9. File Sharing Concerns

By 2020, will online media piracy (illegal filesharing, i.e. P2P) be a greater or smaller concern than it is today?





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Uncertainty Score: 229
Importance Score: 2.13

9. File Sharing Concerns

By 2020, will online media piracy (illegal filesharing, i.e. P2P) be a greater or smaller concern than it is today?

Selected Comments

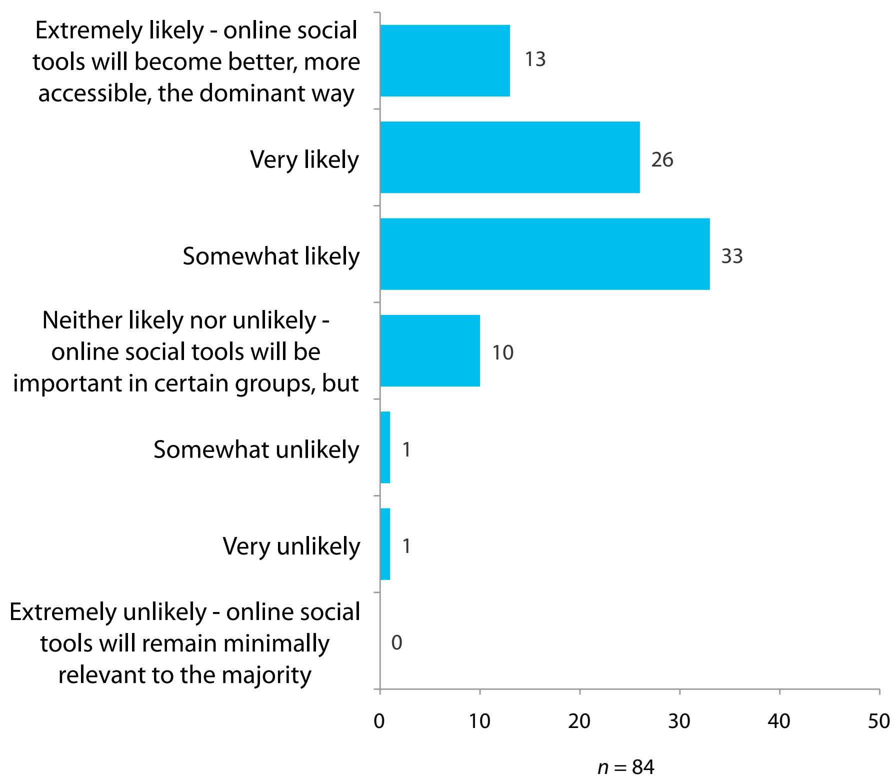
- If there is a content business, rights need to be controlled.
- Consumers will steal if there is no incentive for buying. Disincentive is possible but end-runs are inevitable. Engineer partnerships not raiding parties.
- Somewhat greater concern than today simply because more content distribution will be done digitally. Piracy-control technology will evolve in 9 years but it is perhaps government policies that will be slow to provide the right legal environment.
- Wrong question. The key issue is finding better means of payment/credit and sharing/distribution. Piracy is a way to extend markets and sales - if there is a business model that works to make it profitable.
- I think that Digital Rights Management is constantly evolving, and that it is tightening restrictions on piracy as we speak.
- Copyright is important and consumers will ultimately understand that.
- Hopefully by then there will be more solid systems in place for creators to be paid directly and less money and control from the media companies.
- The pursuit of content/software/services for free got bigger: Napster awakened that drive and I expect it to stay the same. As a marketing/advertising professional, makes no difference to my day-to-day goals for clients.
- People ultimately don't care where content comes from. What they do care about is access to content and DRM prevents rightful enjoyment of what they have bought. Hopefully it is on the way out for good.
- I agree that business models will be forced to innovate around newer forms of copyright and content protection.
- The issue is important because the *perceived* concern distracts from real innovation.

Uncertainty Score: 229
Importance Score: 2.13

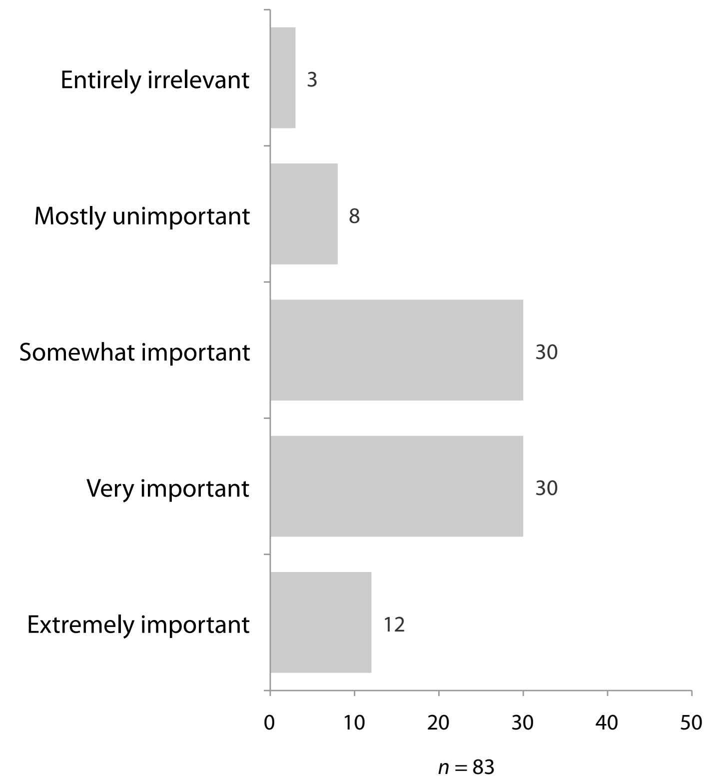
10. Evolving Use of Social Media

How likely is it that by 2020, social media (e.g. Facebook, Twitter, etc.) will play a dominant role in media consumption patterns? In other words, will consumers (in general) rely on social media to select content based on what their 'friends' are consuming

Uncertainty



Importance



Nordicity for sLab, OCAD University

Uncertainty Score: 129
Importance Score: 2.48

10. Evolving Use of Social Media

How likely is it that by 2020, social media (e.g. Facebook, Twitter, etc.) will play a dominant role in media consumption patterns? In other words, will consumers (in general) rely on social media to select content based on what their 'friends' are consuming?

Selected Comments

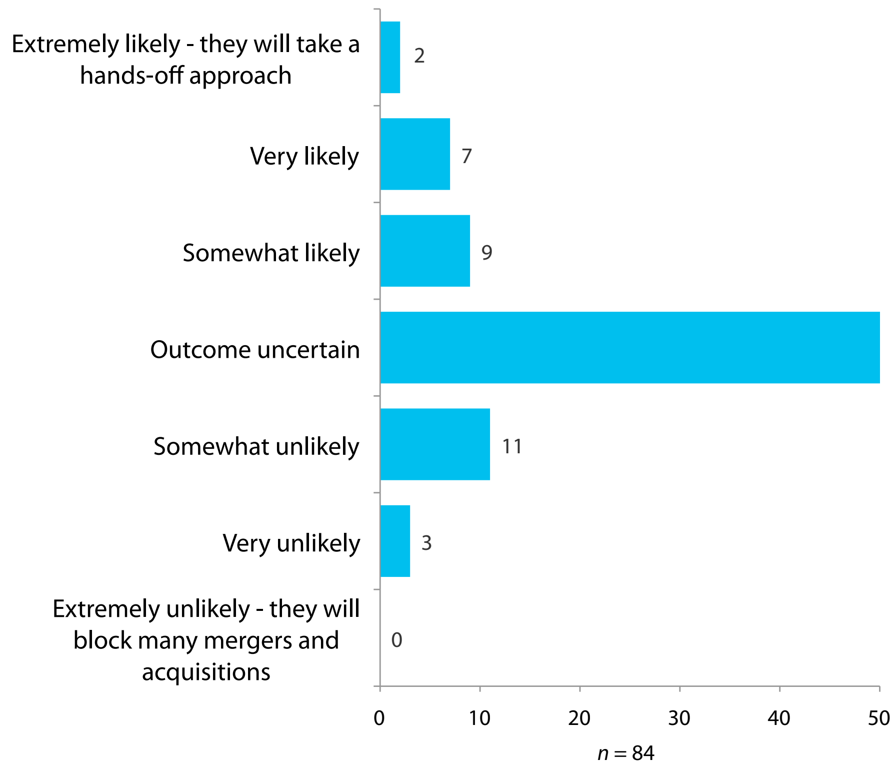
- C'mon. No question. What is the tea-party but tribal behaviour - no funding, no leader, no platform... facebook et al will become robust platforms for social decision-making.
- I am not entirely convinced that social media consumption patterns will continue to trend as dominantly as they appear to be at present. there seems to be a bit of a backlash against aspects of social media that track personal preferences. Privacy issues will need to be dealt with before this aspect can become a dominant influence in consumption patterns.
- Word of mouth is the best advertising, social media is just another way for that to happen more quickly.
- Social platforms will be at the core of the experience of discovering and selecting media content.
- It will become the norm and companies who fail to embrace it will fail. By 2020 I expect it to be taken for granted, we wont be talking about it, just as we don't talk about landlines.
- Social networks are tough to navigate and for many who are intent on reaching audiences, the consumer will be hyper-aware that we are intruding on their personal space.
- The official future = lots of social media with lots of influence
- Social media is important, but it will only become dominant if the larger companies continue to squeeze content providers regarding access to consumers. The effectiveness of social media marketing is still murky.
- I think online social tools will be merged into existing offerings over the next 10 years so that use of them will become seamless for the consumer. This will result is a lot of "casual use". But if you think about it, people already watch what their friends are consuming - they just communicate over a different medium. Doing it online via social media just makes it more obvious, dynamic, transparent, etc...

Uncertainty Score: 129
Importance Score: 2.48

11. Allowance of (Vertical) Media Consolidation

How likely is it that over the next 10 years, the Canadian federal government will look increasingly favourably on mergers and acquisitions in the media industry, resulting in a greater degree of media consolidation?

Uncertainty



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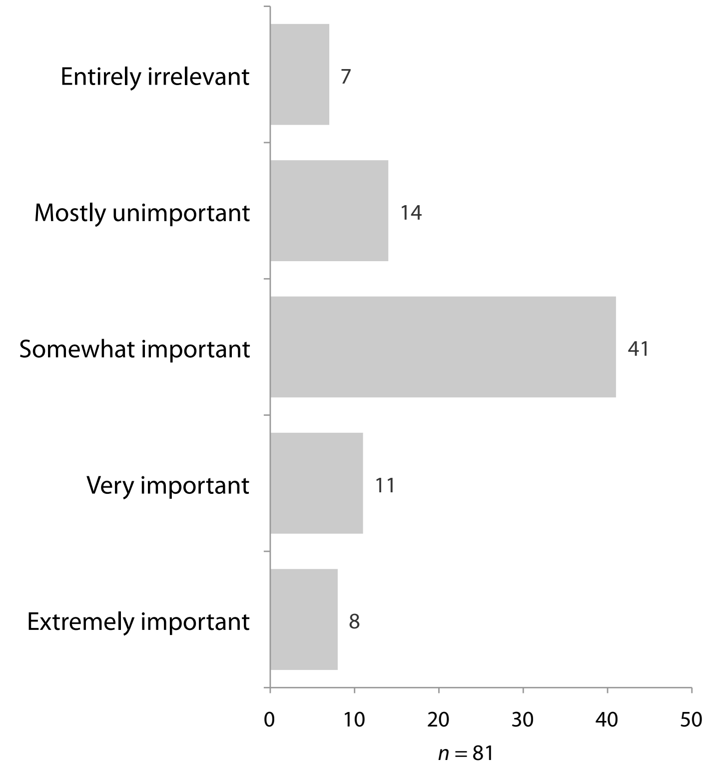


Nordicity for sLab, OCAD University

Uncertainty Score: 238
Importance Score: 1.99

11. Allowance of (Vertical) Media Consolidation

How likely is it that over the next 10 years, the Canadian federal government will look increasingly favourably on mergers and acquisitions in the media industry, resulting in a greater degree of media consolidation?

Selected Comments

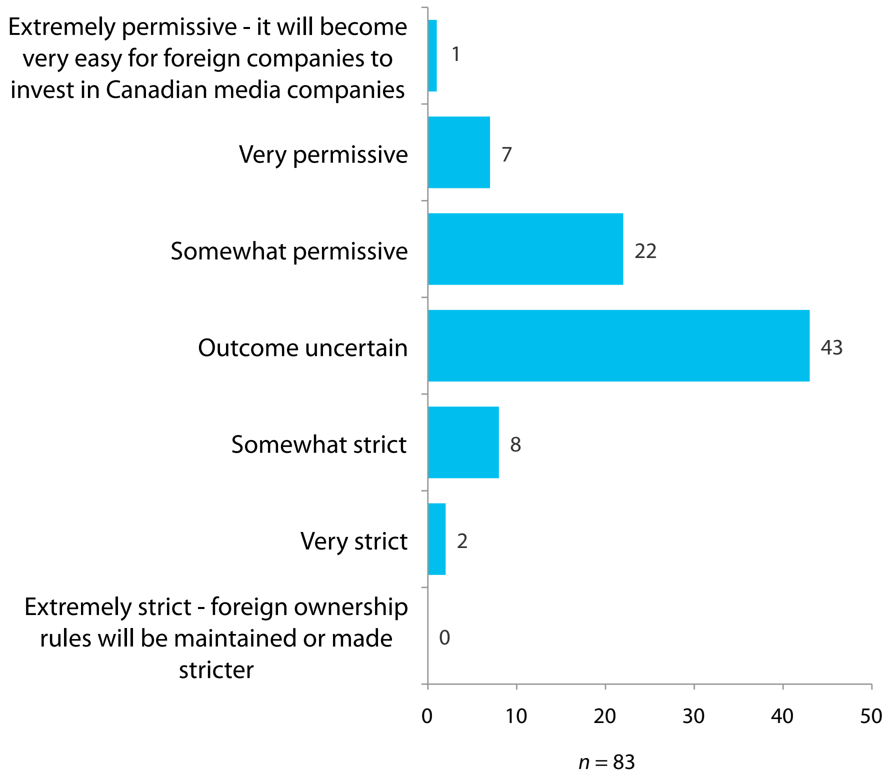
- Media consolidation is what we have now in Canada. As a principal cause of uncompetitiveness, it should be blocked.
- I'm hoping that Canadians are different from US on this one. But I am pessimistic. Gov't is mostly toothless anyway and will media have boundaries 1n 2020?
- Another hot button issue for film & TV producers! the more we see of media consolidation, the more likely we will struggle to maintain fair market pricing for the work we produce. with mergers already being the order of the day (Shaw, CORUS), we are seeing the shift of power going to the newly formed corporate entities.
- As an independent producer, the Provincial and Federal Governments spend our tax dollars attracting foreign investment, who then generally employ non-Canadians to do the work within Canada.
- Creating competition within specific supply/demand relationships is critical to ensuring change and efficiency gains.
- The premise of the question is false. Canada went through 40 years of telecom and television with a few companies. The issue is not consolidation but rather having the requisite scale and resources to compete.
- I believe it is better for most Canadian businesses to have a wider range of media companies to work with. A smaller number of large companies tends to stifle innovation and creativity.
- N. American gov'ts have demonstrated their interest in supporting corporate profits over democratic interests in media. The best way to circumvent will be to create new and better channels and content.
- Media consolidation (and foreign ownership) can freeze or loosen many aspects of the ecosystem.
- Fewer companies means fewer visions and fewer opportunities. And the big companies in media tend to be the most poorly run and lacking in innovation.

Uncertainty Score: 238
Importance Score: 1.99

12. Easing of Foreign Ownership Restrictions

By 2020, will the Canadian federal government have eased foreign ownership regulations as they relate to the Canadian media industries?

Uncertainty



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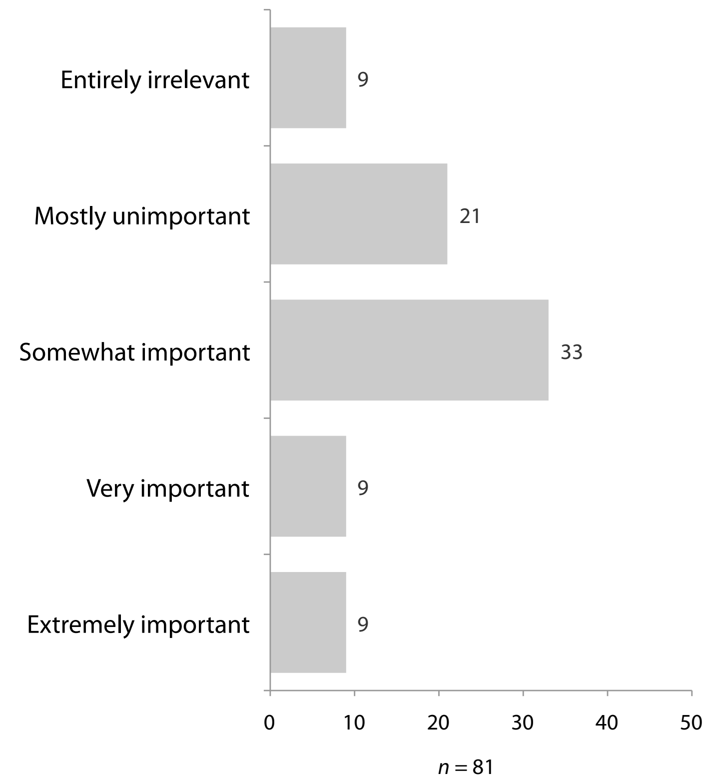


Nordicity for sLab, OCAD University

Uncertainty Score: 244
Importance Score: 1.85

12. Easing of Foreign Ownership Restrictions

By 2020, will the Canadian federal government have eased foreign ownership regulations as they relate to the Canadian media industries?

Selected Comments

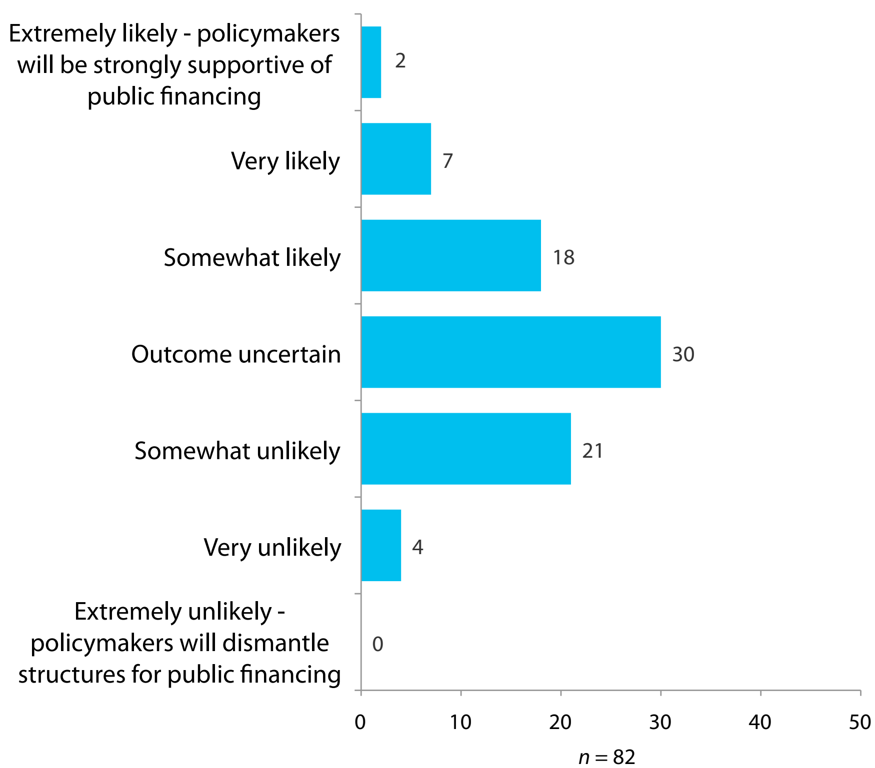
- While foreign investment is great, this needs to be carefully decided as Canada could become a dumping ground for low budget US production., as opposed to taking the higher road of being Canadian-owned and controlled.
- If today is any indication, we will be years behind other countries in developing permissive regulations.
- Ownership is not the problem - there is no difference between a Bay Street and a Wall Street owner. It is content creation throughout society that will matter - either the culture is dynamic in its identity and community formation or.
- I disagree with allowing foreign ownership, and support the CBC, NFB, and other content creators in Canada. However, I think the overpricing by Bell and Rogers is unfair to the consumer.
- Ownership will have little to do with the market. It will be about the ability to meet its needs.
- A number of political factors are shaping up to suggest that Canada will becoming slightly more protectionist in the future - the swing back toward the centre (federally), Canada's fiscal performance during the recession. I'm looking to the recent blocking of the PotashCorp takeover bid as a strong signal.
- Really hard to say. Political winds and parties in power will shift many times between now and 2020. However, mostly unimportant. It will be more important to be able to find and match messages and marketing to end audiences and markets
- Media consolidation (and foreign ownership) can freeze or loosen many aspects of the ecosystem.
- Foreign ownership is not as important as content regulations. Although foreign owners would possibly be more likely to pressure for relaxing those rules as well.

Uncertainty Score: 244
Importance Score: 1.85

13. Level of Public Financing

How likely is it that in 2020, policymakers will be strongly supportive of public financing for the Canadian media industry?

Uncertainty



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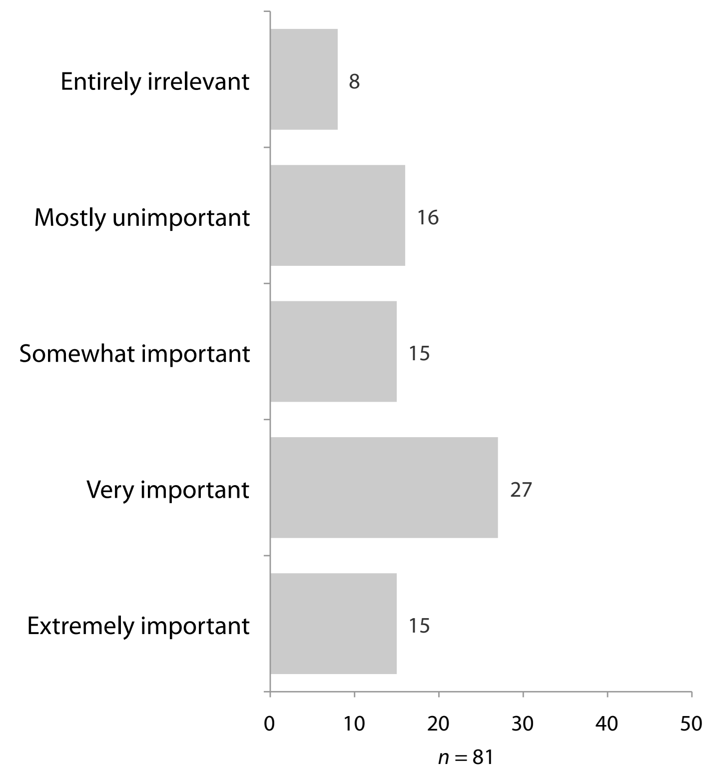


Nordicity for sLab, OCAD University

Uncertainty Score: 241
Importance Score: 2.31

13. Level of Public Financing

By 2020, will public financing programs for Canadian media will be structured to encourage 'convergent' (i.e. cross-platform) projects using programs (like the Canada Media Fund) that mandate multiple exhibition platforms (e.g. TV, web, etc.) per project?

Selected Comments

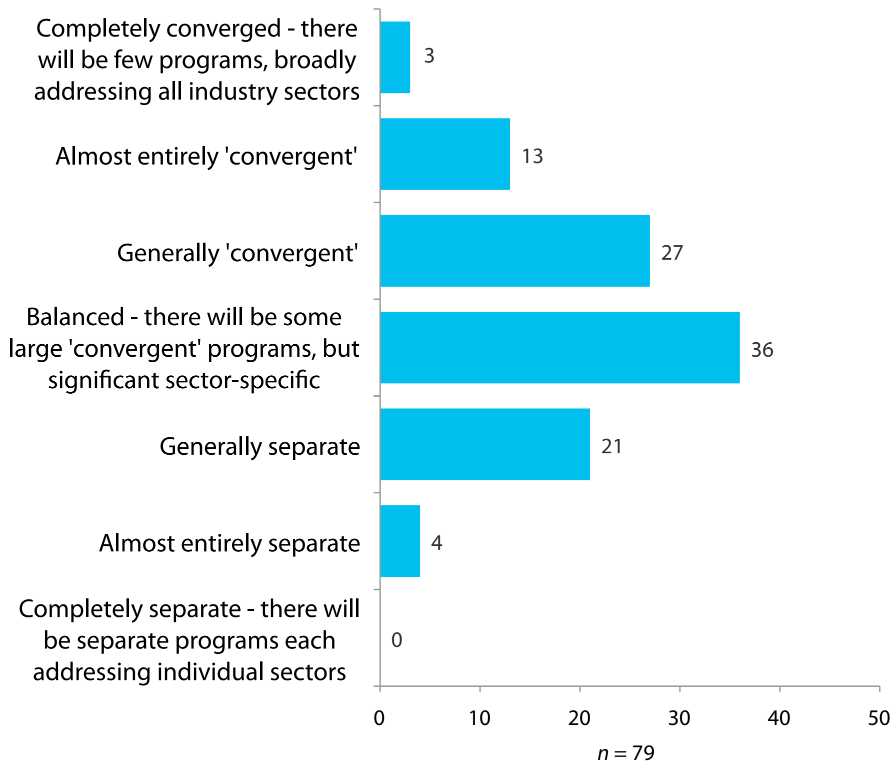
- Economics. Arts funding the first to be trimmed.
- The minimal amount of public financing available in Canada is what has actually helped to build the dynamic industry centres of production across this country. The actual ROI has been calculated at anywhere from 8:1 all the way up to 20 :1 ROI on public investment in the media industries. Tax credits have made Canada a go to location for numerous foreign producers, esp the Americans. This is money well spent.
- Subsidies are bureaucratic and sclerotic. Time to find other ways to address the encouragement of public goods - community value.
- It's helpful to have support to produce Canadian content in Canada and to produce product for export.
- Public funding will always be necessary in Canada.
- As with many other businesses in Canada, maintaining government support it vital in keeping the economy healthy and viable.
- The entire ecosystem is dependent (arguably addicted) to public support -- thus vulnerable to change, rather than resilient.
- The current model is broken and mostly props up large companies. New companies cannot get funding, because funding levels are based on precedent. Unfortunately, broadcasters now expect public money, and have become dangerously dependent on it.
- I think the Canadian content argument is not likely to go away, not even in 2020. There are likely to be other reasons for funding media as well, e.g. education, innovation, culture etc.

Uncertainty Score: 241
Importance Score: 2.31

14. Public Policy & Convergence

By 2020, will public financing programs for Canadian media will be structured to encourage 'convergent' (i.e. cross-platform) projects using programs (like the Canada Media Fund) that mandate multiple exhibition platforms (e.g. TV, web, etc.) per project?

Uncertainty



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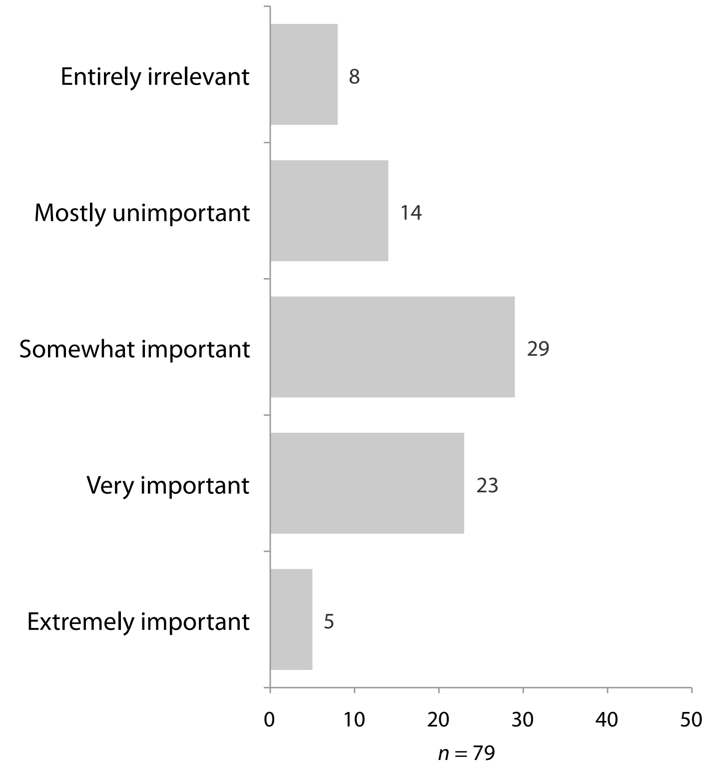


Nordicity for sLab, OCAD University

Uncertainty Score: 188
Importance Score: 2.04

14. Public Policy & Convergence

By 2020, will public financing programs for Canadian media will be structured to encourage 'convergent' (i.e. cross-platform) projects using programs (like the Canada Media Fund) that mandate multiple exhibition platforms (e.g. TV, web, etc.) per project?

Selected Comments

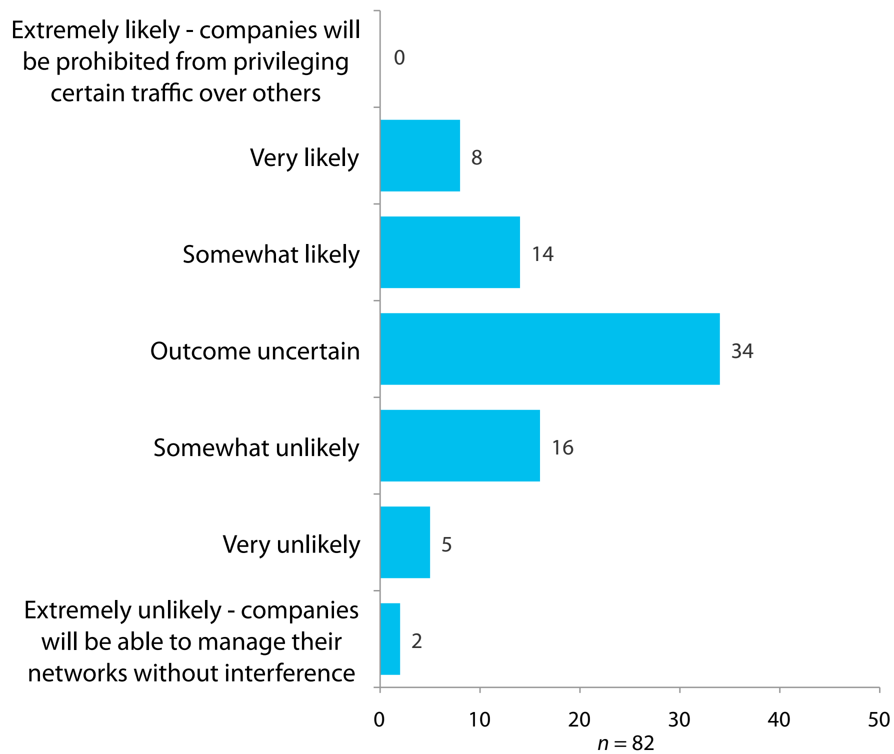
- No interest or capability in guessing where public policy goes
- Convergence of media is most significant in emergency public information provision - where the maximum number of people need to be reached quickly. Media themselves will change over the next 20 years and the most significant media will be used when available and practicable.
- This is already in place and will continue to be necessary to reach CDN audiences.
- It will cause companies to merge in order to handle the new regulations.....which means less profit, larger overhead.
- If funding is targeted at convergent projects, we need to position ourselves to deliver.
- Interoperable, intelligent and somewhat convergent- we should work in this direction, using the best of each platform to focus on its strengths.
- Projects will need to driven by market rather than how they are delivered.
- My company is based on convergent models. It is important to have certain structures in place in order to help develop these types of projects but it is also necessary to have strong individual skill-based companies that deliver specific types of products and services.
- Optimistically I hope for much more convergence. But I currently see mostly inertia.
- It would be great if we could monetize the internet. Currently, our non-Ontario consumers cannot get our product without paying for a specialty channel.
- In 2020, most projects will be convergent to a degree (or at least in phases). It will no longer be an option. It will also be easier to do due to technology advancements.

Uncertainty Score: 188
Importance Score: 2.04

15. Network Neutrality in Canada

How likely is it that by 2020, network neutrality will be mandated and enforced in Canada (e.g. by CRTC regulation or by Act of Parliament)?

Uncertainty



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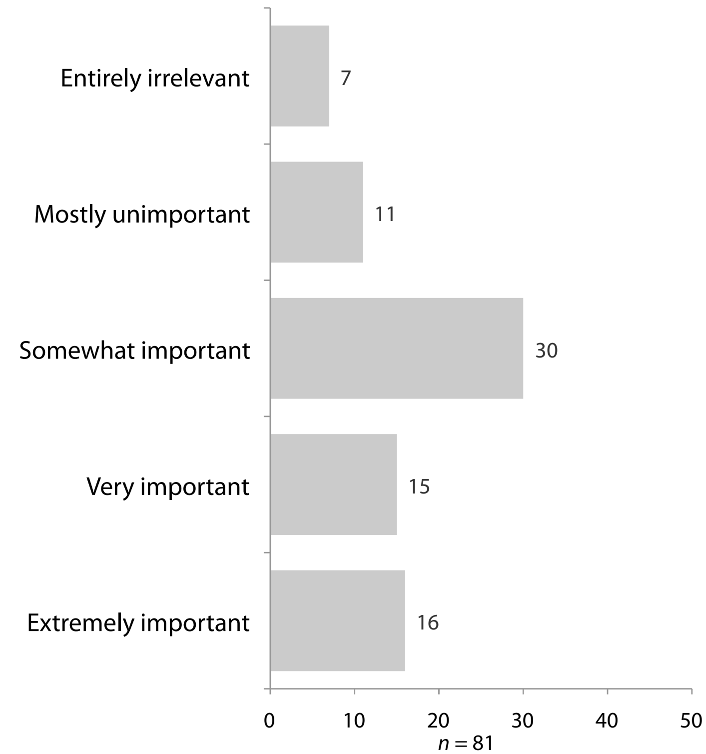


Nordicity for sLab, OCAD University

Uncertainty Score: 248
Importance Score: 2.28

15. Network Neutrality in Canada

How likely is it that by 2020, network neutrality will be mandated and enforced in Canada (e.g. by CRTC regulation or by Act of Parliament)?

Selected Comments

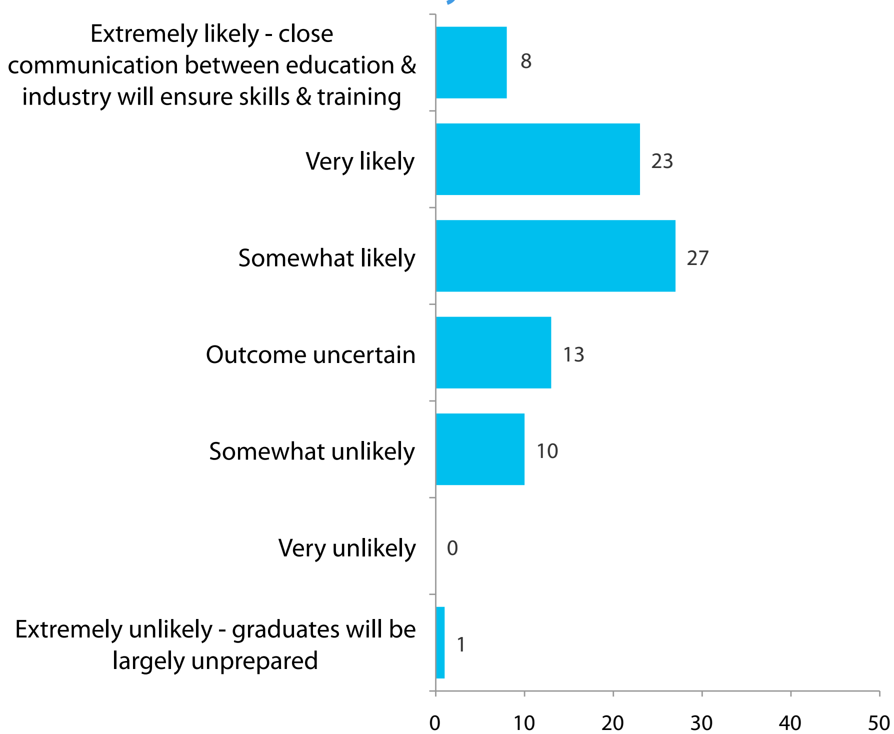
- Network Neutrality is like education, it is best if it can be available in the same quality to every person.
- Since internet bandwidth consumption has been driven so completely in the past 3 years by video, i.e. private consumer, it seems unlikely that bandwidth stays "neutral“
- You can take my car, my house my iPhone, but if you dare take my net neutrality there will be hell to pay!
- The fear for small content producers is that large network providers will compete by making sites outside their networks slow or impossible to access.
- Critically important but politically hard to say.
- To not enforce network neutrality would be undercut the alternate media networks and voice, and unfortunately, I predict as we swing further right, we will allow the mainstream media's voice to dominate.
- It should be left to the engineers and not to the regulators or the marketers.
- Network neutrality is another important necessity for keeping innovation alive and kicking. As well, in terms of accessibility it is important to maintain it as a neutral network. More people online = more customers in very basic terms.
- Hopefully, 10 years from now, we'll look back and think this conversation was insane. Of course net neutrality makes sense, the question is, do we have the sense to pursue it fully?
- The anti-net neutrality lobby is extremely strong. Recent rulings are discouraging.
- Network neutrality is a positive externality and is something that is worthwhile fighting for. However, there are sound arguments against absolute network neutrality. Maybe more competition in the industry might work in lieu of complete network neutrality, or may not, in which case then network neutrality is a necessity.

Uncertainty Score: 248
Importance Score: 2.28

16. Talent Development for the Digital World

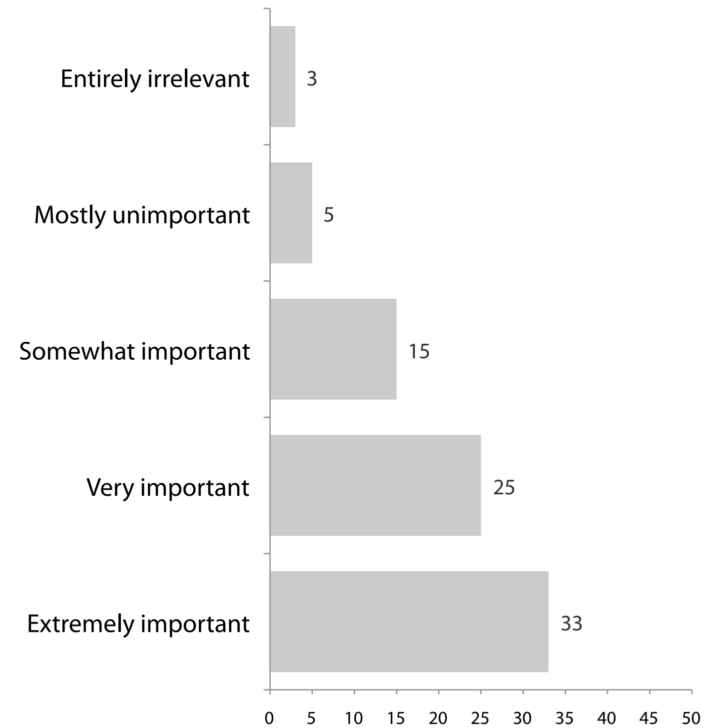
By 2020, how likely is it that Canadian post-secondary educational institutions and other training programs will produce graduates with the needed creative, business and technical skills to suit the evolving media sector?

Uncertainty



n = 82

Importance



n = 81

Nordicity for sLab, OCAD University

Uncertainty Score: 166
Importance Score: 2.99

16. Talent Development for the Digital World

By 2020, how likely is it that Canadian post-secondary educational institutions and other training programs will produce graduates with the needed creative, business and technical skills to suit the evolving media sector?

Selected Comments

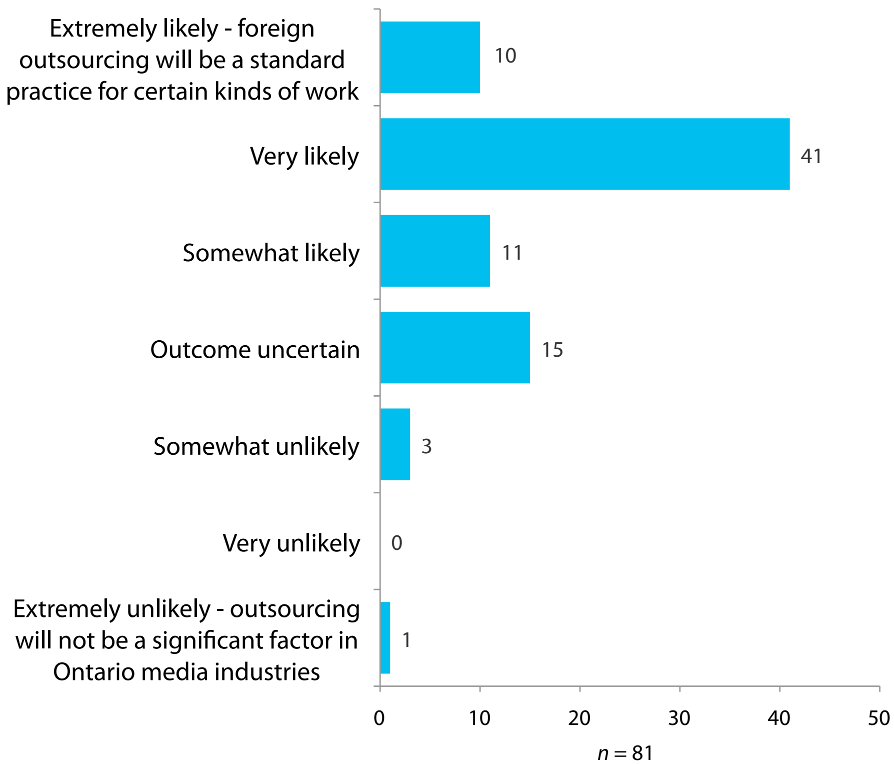
- We will still find the right talent in the global economy. Up to Canadians to compete.
- Innovation should be top priority for establishing Ontario and Canada as a digital media leader.
- I am not convinced yet that the programs available in CDN universities are going to be competitive with those in China and India and South East Asia, critical if we wish to continue being in the game.
- The study of history and geography are more important than knowing how to use a Twitter account.
- Post-secondary institutions have already started to evolve. Given the rate of growth in technology and information, the concept of a 4-year undergrad degree makes little sense. Training required tighter integration with both industry and network hubs.
- Current graduates are very poorly prepared for real business careers and we find ourselves having to teach basic skills from the day they join. If anything, this seems to be getting worse, not better.
- This is not a role for post-secondary education. Let the universities focus on literature and philosophy, physics and biology. Creativity will be an ambient community attribute, not an industry or specific skill.
- 10 years are enough to overcome inertia? Changing curricula usually is a long process.
- Schools should not focus too much on technology but rather on thinking and creativity.
- Except for the most elite US schools, Canadian curricula are already ahead of most in media design and technology.
- Universities are still medieval in their structure and may never match the pace of technology.
- The preparedness of graduates in terms of truly useful skills is abysmal. The schools are churning out far more graduates than the market can support, and then jobs are rewarded based on networking and friendships, not merit. There is no communication between the work world and the schools in this sector.

Uncertainty Score: 166
Importance Score: 2.99

17. Role of Outsourcing and Foreign Workers

How likely is it that by 2020, Canadian cultural media companies will outsource a greater volume of work (e.g. more animation) to workers in other countries?

Uncertainty



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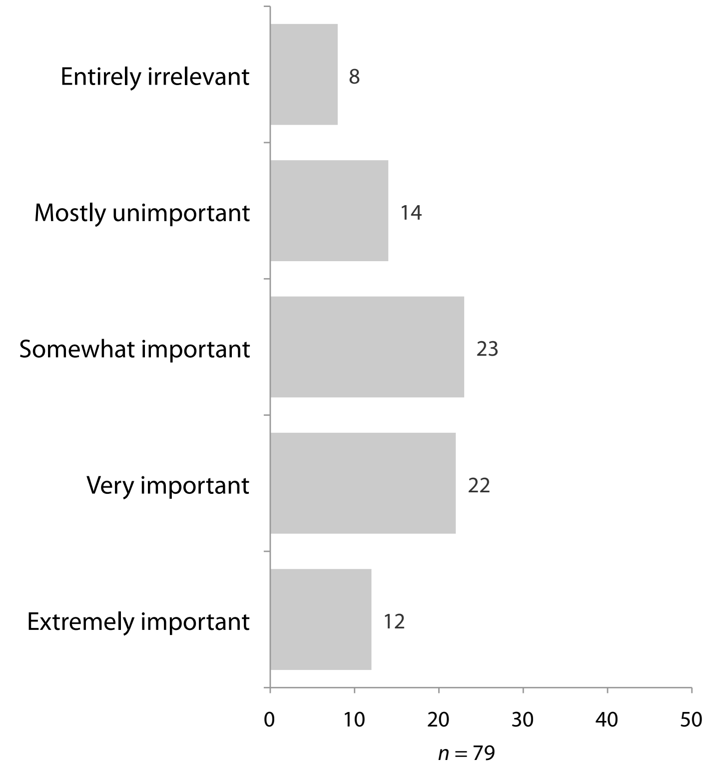


Nordicity for sLab, OCAD University

Uncertainty Score: 133
Importance Score: 2.20

17. Role of Outsourcing and Foreign Workers

How likely is it that by 2020, Canadian cultural media companies will outsource a greater volume of work (e.g. more animation) to workers in other countries?

Selected Comments

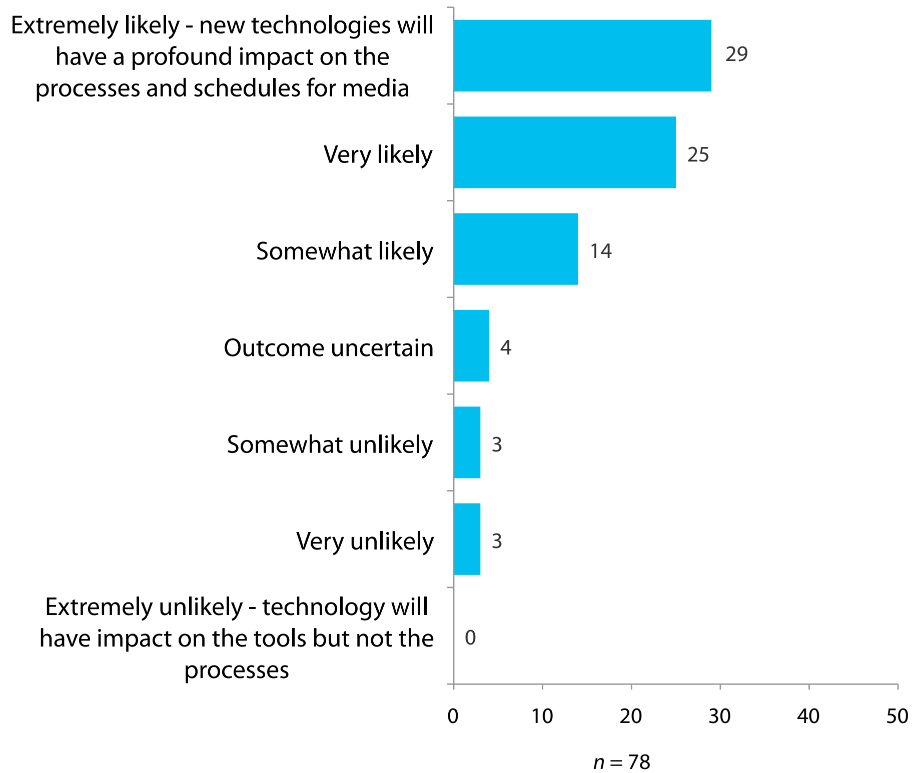
- The Ontario media business was built on Canada being the outsource. If Canada outsources to other countries it risks losing its creative edge.
- If lacking the appropriate level of graduates in Canada, it will be necessary to tap into the talent emerging from the more advanced international university programs.
- Personally I'm in favor of free and open trade - it's a win-win scenario. I think if people embrace working with everyone in the world we will all be better off.
- This is the #1 issue for domestic animation production studios.
- The question considers only the outsourcing aspect, which depends on the competitiveness of local resources and the Canadian economy. The "import" of skilled foreign workers is an alternative avenue, but also depends on the competitiveness of Canada as a place to work and live in.
- Just as manufacturing got outsourced, the technical aspects of media will be outsourced.
- Industrial activities should be efficient - outsourcing is good.
- As long as production costs are higher in Canada and the quality of outsourced production is reliable, it becomes economically difficult to justify doing the work in Canada.
- I believe we should employ Canadians first to fill jobs.
- Unlikely for provinces with significant tax credits. For provinces without incentives to keep production local, outsourcing to other provinces or countries is more likely.
- The efficiencies of different markets will become relevant. Developing countries are hyper-motivated to take on this work and will affect the labour and production pricing. Anything that can be outsourced, w/o compromising the core idea, will be outsourced. The sooner we get used to knowing which component to control

Uncertainty Score: 133
Importance Score: 2.20

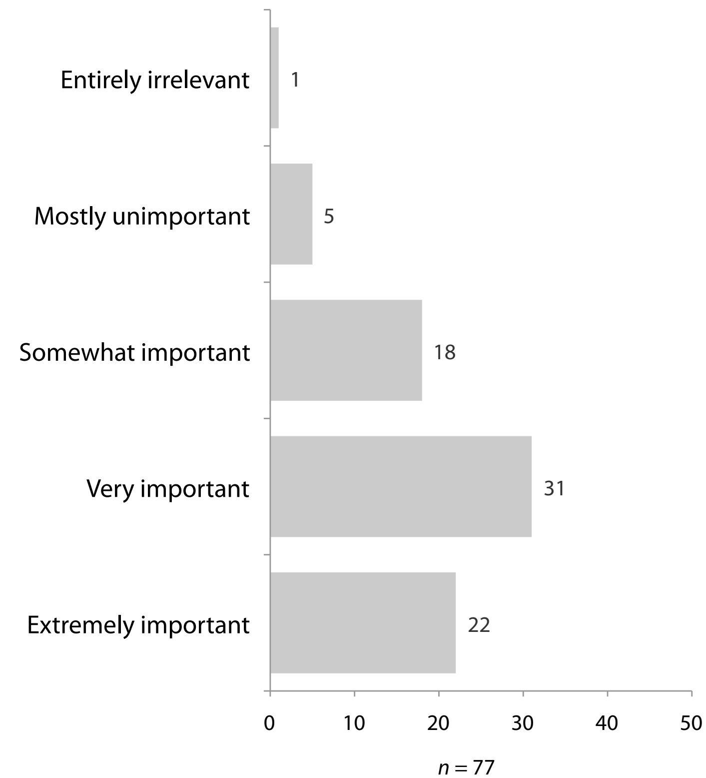
18. Impact of Digital Production Processes

By 2020, how likely is it that new technologies will completely transform media production processes (e.g. workflow and content/asset management)?

Uncertainty



Importance



Nordicity for sLab, OCAD University

Uncertainty Score: 108
Importance Score: 2.88

18. Impact of Digital Production Processes

By 2020, how likely is it that new technologies will completely transform media production processes (e.g. workflow and content/asset management)?

Selected Comments

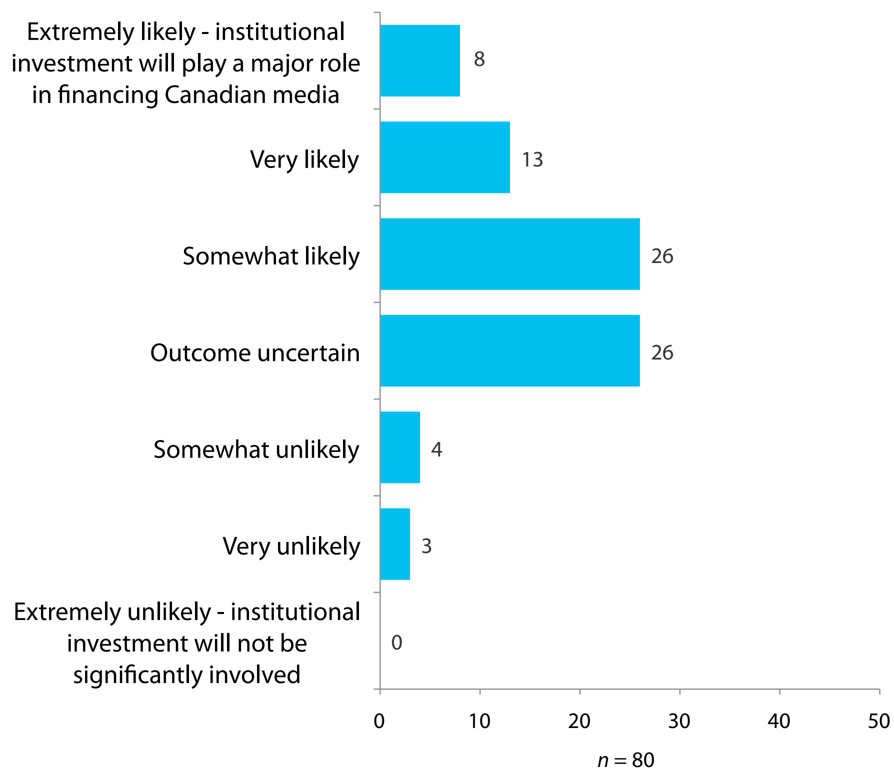
- I am already seeing the rapid shift in production and post technologies. it will be important to stay ahead of the curve and tap into these emerging technologies to make content.
- I do not believe that it will "completely transform" as some things stay consistent (a good story is a good story, sketching will always be a part of the process) but technology change will continue to affect the creative process as it always has
- I work in the visual effects world - we rely on new, bigger, better, faster, smarter, etc. all the time. We always seem to find the current limitations quickly and want more. I don't see this ever changing and there will always be room for growth.
- I think that in 10 years there will have been significant transformation, but still far from complete transformation, as I don't expect old media models to disappear in that time.
- New technologies and staying at the forefront are essential to be competitive in the global community in which we compete.
- We need to keep up with the state of the art to avoid stagnating and failing.
- I think we are already there- I am more interested in the use and support of FLOSS as opposed to proprietary software.
- Expectations for speed of delivery are already too high based on a misunderstanding of the limits of technology. Staff is expected to work ludicrous hours, and burnout is high.
- Sure it will change existing workflow processes, or rather make it possible to adapt them for new needs, e.g. multi-platform delivery. But "completely transform"? Perhaps not.

Uncertainty Score: 108
Importance Score: 2.88

19. Role of Institutional Investors

How likely is it that in 10 years, institutional investment (e.g. angel networks, venture capitalists, co-managed funds, etc.) will play a significant role in financing the Canadian media industries?

Uncertainty



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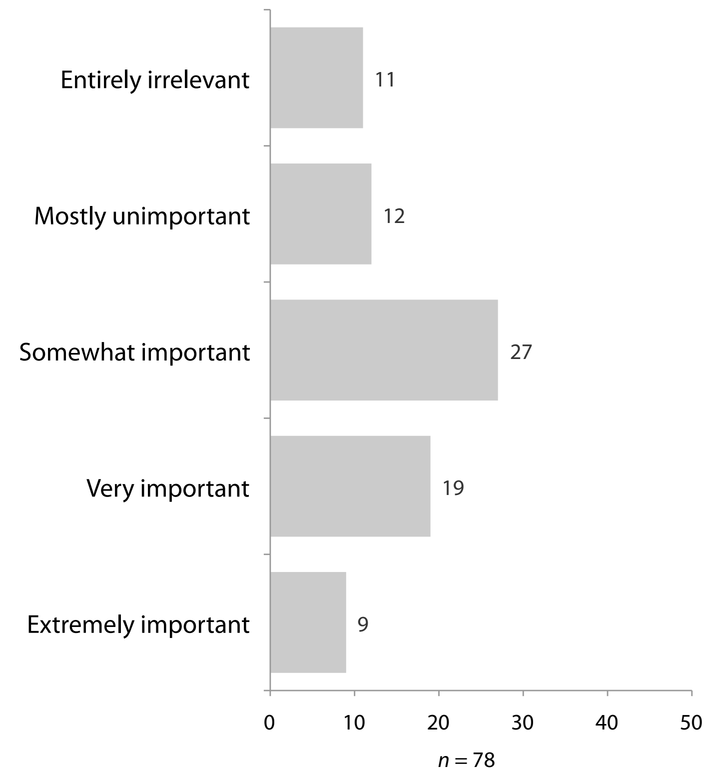


Uncertainty Score: 184
Importance Score: 2.04

Nordicity for sLab, OCAD University

19. Role of Institutional Investors

How likely is it that in 10 years, institutional investment (e.g. angel networks, venture capitalists, co-managed funds, etc.) will play a significant role in financing the Canadian media industries?

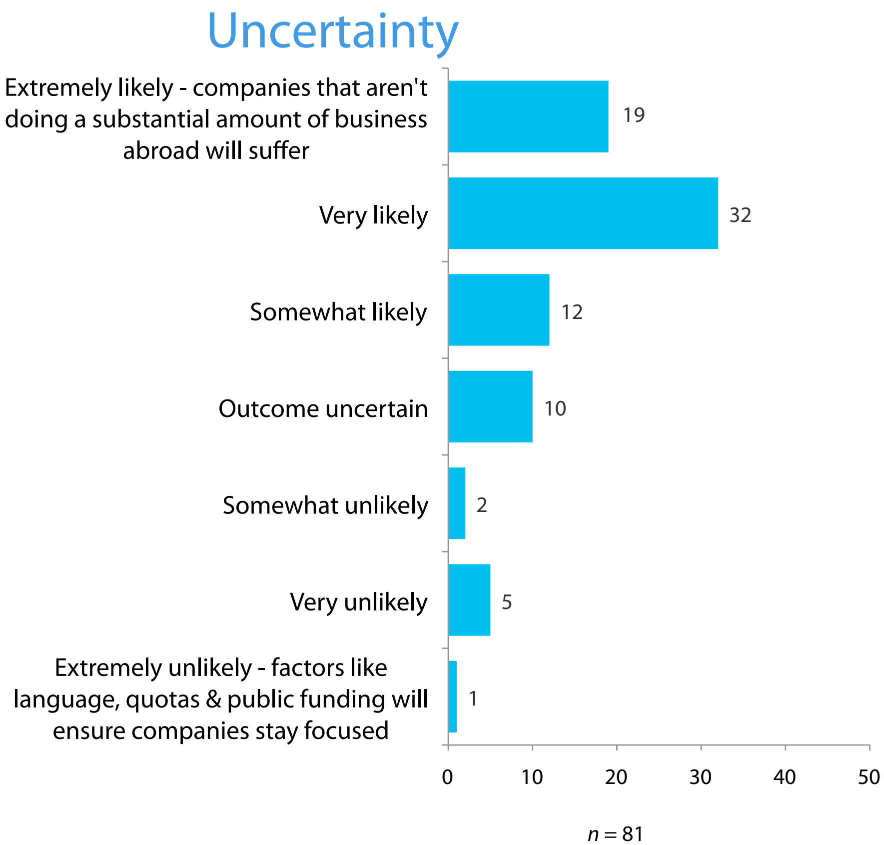
Selected Comments

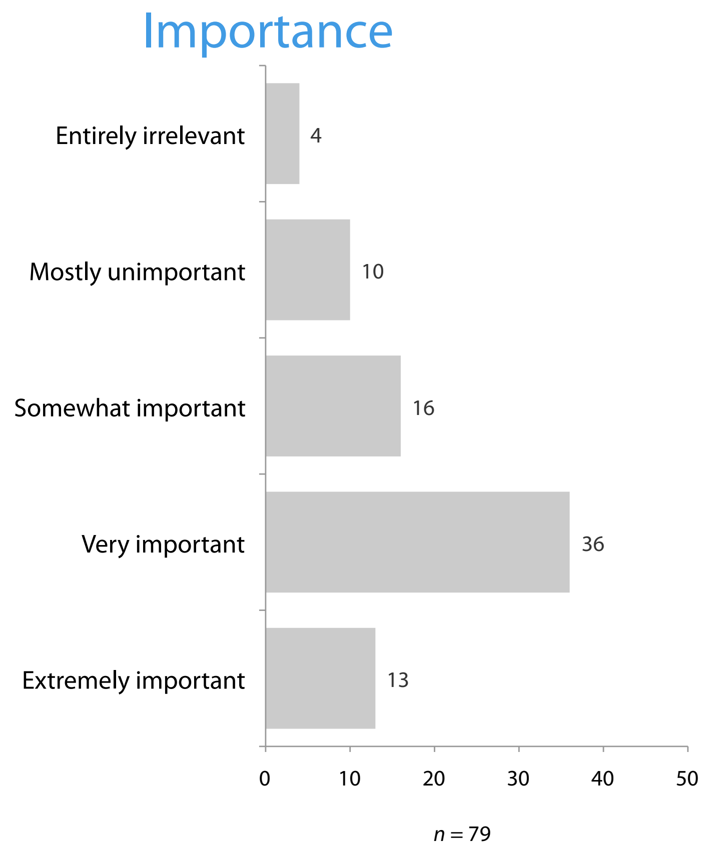
- We don't need it. Well funded and capable.
- All investment in media is good.
- I do not see any current incentives to warrant this in the realm of film/TV production. Venture cap seems to be a more likely prospect for high-tech companies. it could be an interesting avenue to pursue if government incentives existed.
- Will it happen ? Tough to answer. Should it happen ? Yes, this change will affect how many of these media businesses are run, and can improve the likelihood of success. That does not remove the important of public funding, however.
- Red tape, high tax rates, and restrictions on foreign ownership mitigate against investment in Canadian media companies. I looked at a dozen + opportunities in the past decade and walked away from all. Investing in American or Asian companies just makes more sense.
- I support government funding for R & D in creating and distributing Canadian culture.
- Investment is not the problem. Government policy limits growth and access to markets.
- Government funding is and has been a valuable resource for digital companies but other types of investors will be invaluable to the development of new technologies and ideas as they have the ability to be more flexible and forward thinking.
- Broadcasters are too focused on government money. There is no system for private investment that doesn't drown in red tape, and the profit margins in Canadian entertainment are too small to warrant meaningful investment.

Uncertainty Score: 184
Importance Score: 2.04

20. Media on a Global Stage

By 2020, how likely is it that Canadian media production and distribution will sell their wares primarily in a global marketplace?





Nordicity for sLab, OCAD University

Uncertainty Score: 132
Importance Score: 2.56

20. Media on a Global Stage

By 2020, how likely is it that Canadian media production and distribution will sell their wares primarily in a global marketplace?

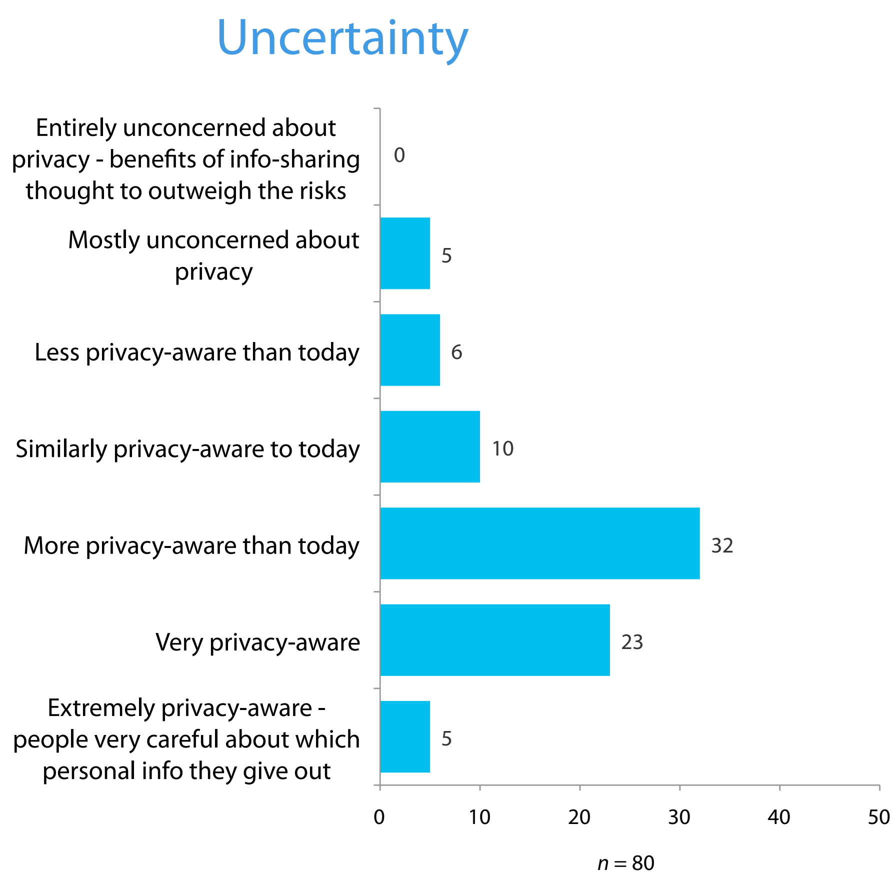
Selected Comments

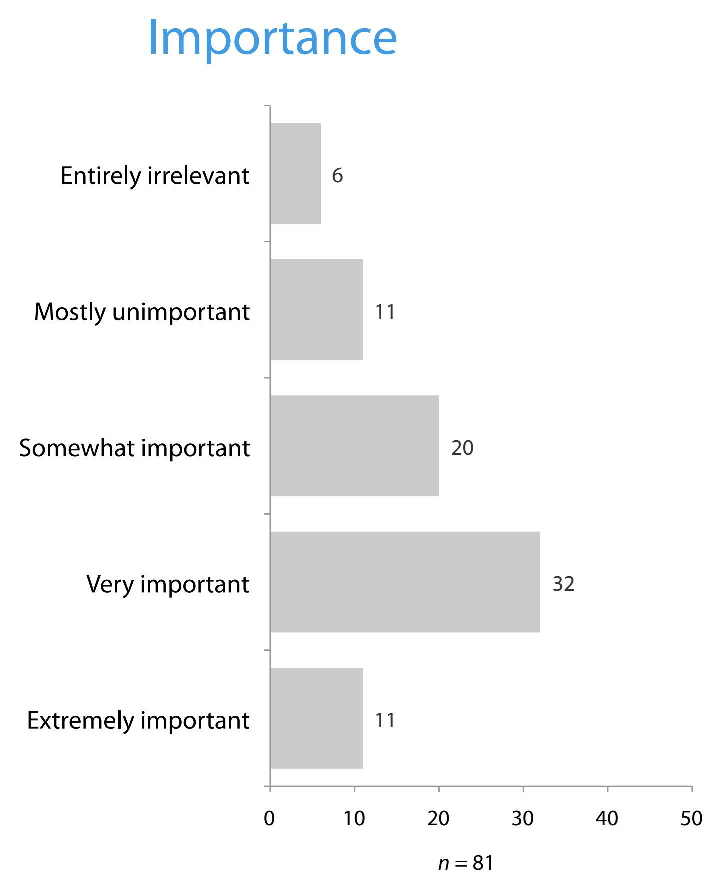
- We operate in defined territories.
- Clients are increasingly more distributed across different locations
- Canada is a brand. Exploit it and win. Ignore it and perish.
- In an open world we all benefit.
- There is competition, but growth will come from international markets.
- Creators in other countries will be developing global content, that directly competes for Canadian interest, attention and resources. As such, Canadian creators will, de facto, be competing in a global marketplace. This does not mean that their content needs necessarily to reflect a distinctively global perspective. It might have more to do with more effectively reaching the global users of our content.
- Maya is the best example of this- software which is the international standard for 3D animation.
- The Canadian market is already global. If you can't sell here you won't be able to sell elsewhere.
- Unless Canada's population increases significantly, it seems more reasonable (and lucrative) to look to international markets in which to ply our trade.
- While globalization will become more important, foreign markets cultivate their own domestic content, and product from Canada has always been met with some skepticism.
- I hope so. The Canadian market, though nice is still too small.

Uncertainty Score: 132
Importance Score: 2.56

21. Evolution of Attitudes Towards Privacy

By 2020, how sensitive to privacy concerns will media consumers be?





Nordicity for sLab, OCAD University

Uncertainty Score: 173
Importance Score: 2.39

21. Evolution of Attitudes Towards Privacy

By 2020, how sensitive to privacy concerns will media consumers be?

Selected Comments

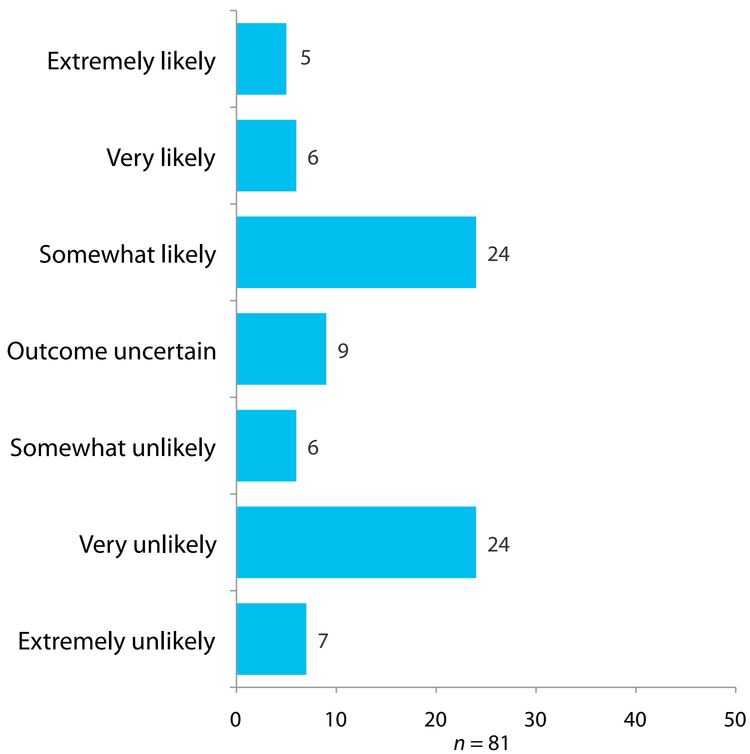
- We want to cultivate relationships with our customers, so this will be a challenge we will have to deal with.
- What did I eat that makes me feel so cynical about this one.? AI will know/predict everything about those who venture out of the forests.
- Privacy and security will always be important. If tools and frameworks are developed that make us secure in our interactions, we will be freer to innovate and engage.
- Being able to align sense of self to one's avatars will be important for developing and using identity in a multi-layer, swirling cloud of communities.
- What one can see is that the more people are familiar with the detailed problems of privacy management in social media and other platforms the more they react in order to protect their privacy. Also, the older the user the more he or she is worried about these aspects... if he or she has had the opportunity to learn about the underlying policies of social media sites. By 2020 there probably will be more tech-savvy elders than now.
- This information is gaining importance through Facebook settings, and data-mining through ISPs and consumers are becoming increasingly concerned.
- Consumers are not aware yet of this issue but they will be when it starts to hurt them.
- It'll have a massive impact on marketing and advertising and I often think about The Great Opt Out that could happen — think TIVO behaviour, 1000 times over, across multiple media
- We are all immature in our information dealings and eventually a wiser set of practices much evolve.

Uncertainty Score: 173
Importance Score: 2.39

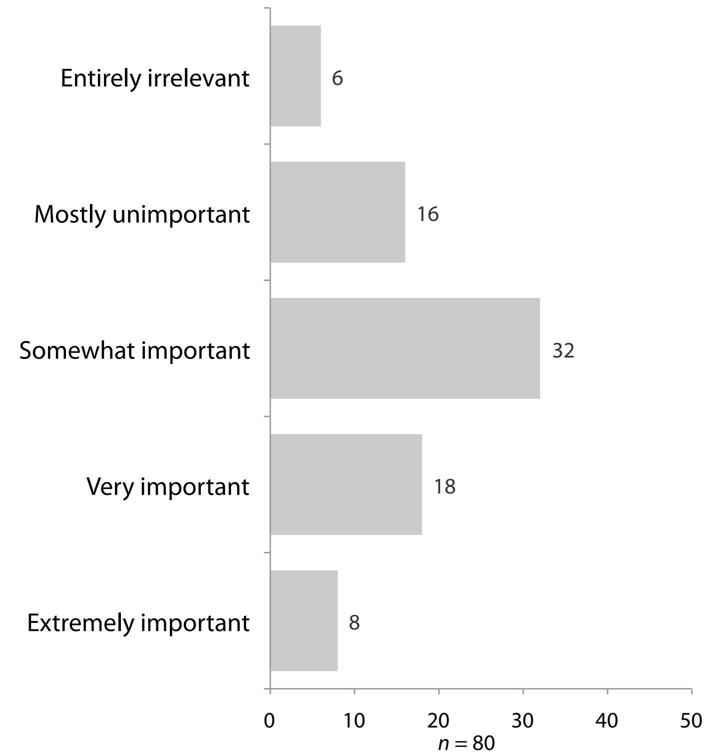
22. Likelihood of Media Overload

How likely is it that by 2020, it will be common for people to be so overwhelmed by the intensity of the media environment that they will find ways to start "unplugging" en masse?

Uncertainty



Importance



Nordicity for sLab, OCAD University

Uncertainty Score: 226
Importance Score: 2.08

22. Likelihood of Media Overload

How likely is it that by 2020, it will be common for people to be so overwhelmed by the intensity of the media environment that they will find ways to start "unplugging" en masse?

Selected Comments

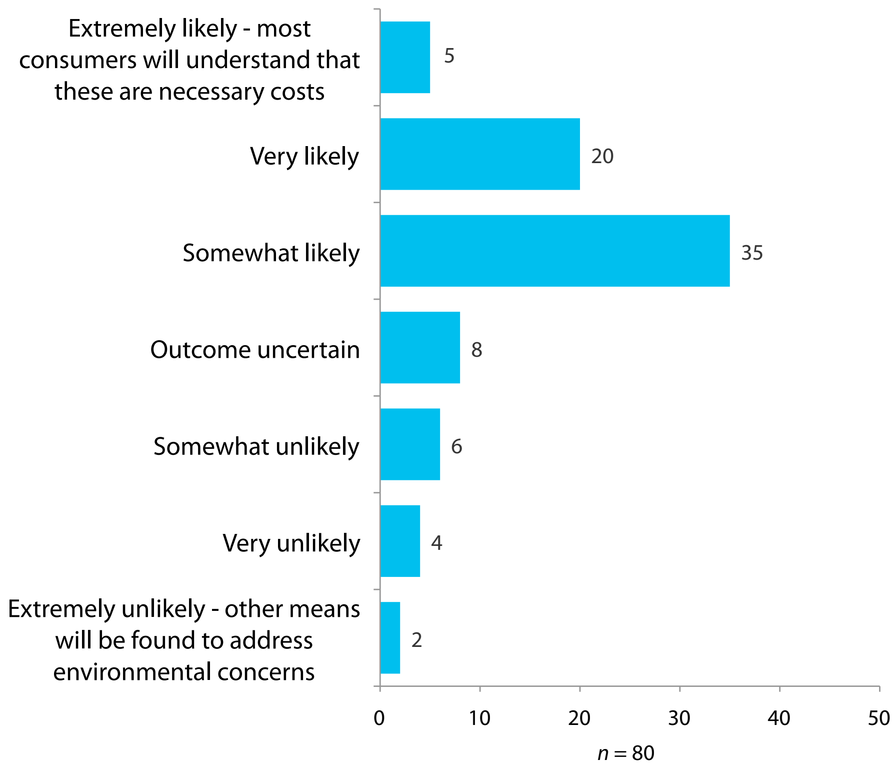
- I think the idea of a media holiday is not a bad one. … By 2020, it will be unlikely that media burnout will cause a mass unplugging. blackouts, however, could be an issue.
- I don't think people are going to change very much - we are what we are - we like what we like, people tend to make marginal adjustments not en-masse switch-flipping (unless something new comes along - and everyone jumps on board.)
- While some will choose to unplug, the majority will learn to focus the content that they are exposed to. Whether its through a careful prioritization of their rss feeds or choosing friend to remove from their friend feed, we all make choices about what we are exposed to. There will be a backlash against content providers (advertisers) that do not respect the concerns of users
- The need for individual control and multiple sources of filtering will render the need to unplug irrelevant.
- Except for eccentrics and cults, most such unpluggings will be temporary.
- Addiction to content beats overload .
- This question assumes an old model of media. Media is also about taking the subway and paying for the ride with a PDA.
- Will be one of the major hurdles to negotiate as a marketer and advertiser
- If "Quit facebook day" can't get real liftoff, how much traction will we see for "Let's all log off together"?
- It's already starting to happen, aided by fewer and fewer products having mass appeal, and a lack of quality programming for certain demographics.

Uncertainty Score: 226
Importance Score: 2.08

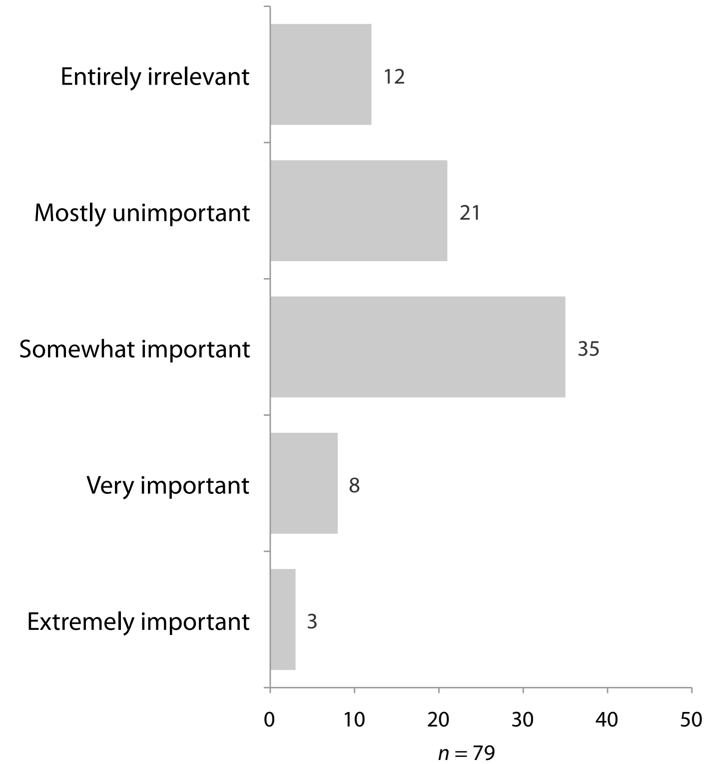
23. Role of Environmental Concerns in Media

How likely is it that by 2020, there will be stringent regulation and/or taxes on consumer electronics aimed at minimizing their environmental impacts?

Uncertainty



Importance



Nordicity for sLab, OCAD University

Uncertainty Score: 180
Importance Score: 1.61

23. Role of Environmental Concerns in Media

How likely is it that by 2020, there will be stringent regulation and/or taxes on consumer electronics aimed at minimizing their environmental impacts?

Selected Comments

- It will be market driven as stated in the responses. yes, there's value in the electronics.
- this will continue to be an area of concern for both consumers and manufacturers. the notion of environmental "correctness" is already used as a sales tool. it will only be a matter of time before we see large scale sales of environmentally correct hi-tech products. if we continue to see massive environmental shifts, this issue will grow in import.
- I wish I thought that this was very or extremely likely. But given Canada's recent track record with environmental regulations, I expect the financial interest of large corporations will, unfortunately, continue to be put first.
- Scarcity for rare elements used in electronic consumer devices, increasing cost of government/ municipal recycling efforts, and environmental concerns will drive new solutions for reflecting the true life-cycle cost of such devices.
- I would expect consumer electronics companies will continue their evolution of low power consumption, more eco-friendly products in the coming decade.
- Power generation footprints will be on the decline and use will be more efficient
- If people find entry costs too high, they won't be in the market for our products.
- Hopefully this will become more of a concern and become legislated.
- There are enough politics on this issue to choke a horse.

Uncertainty Score: 180
Importance Score: 1.61