

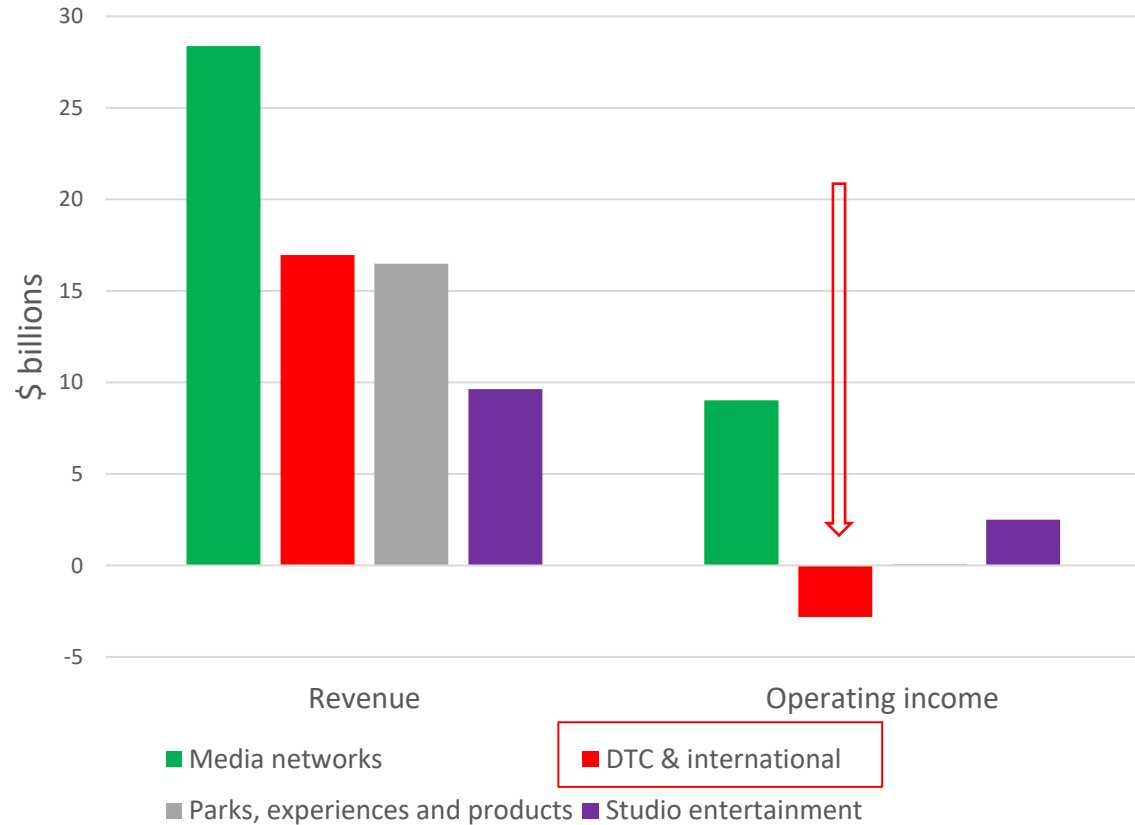
State of Remote Production

Lorenzo Zanni, Head of Knowledge, IABM

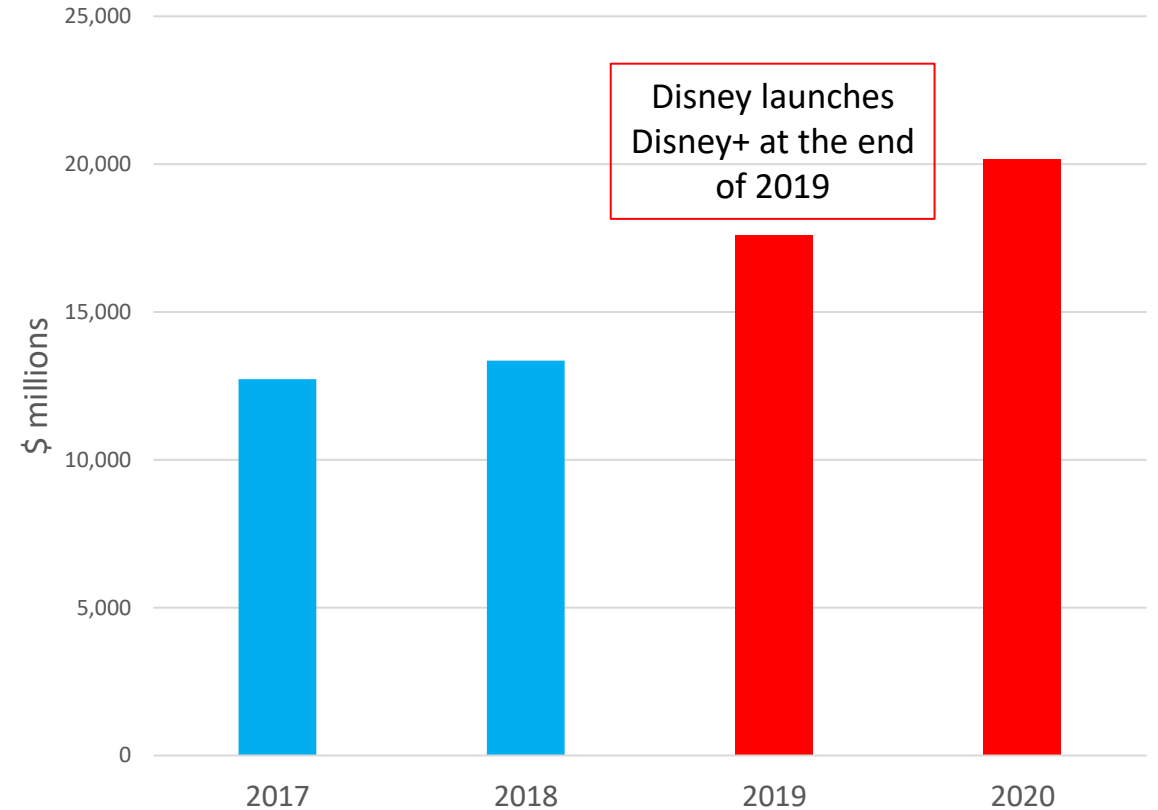
Media Business Models

Moving to digital offerings - Disney case study

FY 2020 Disney Revenue by division



Spending on content rights, licenses and production at Disney



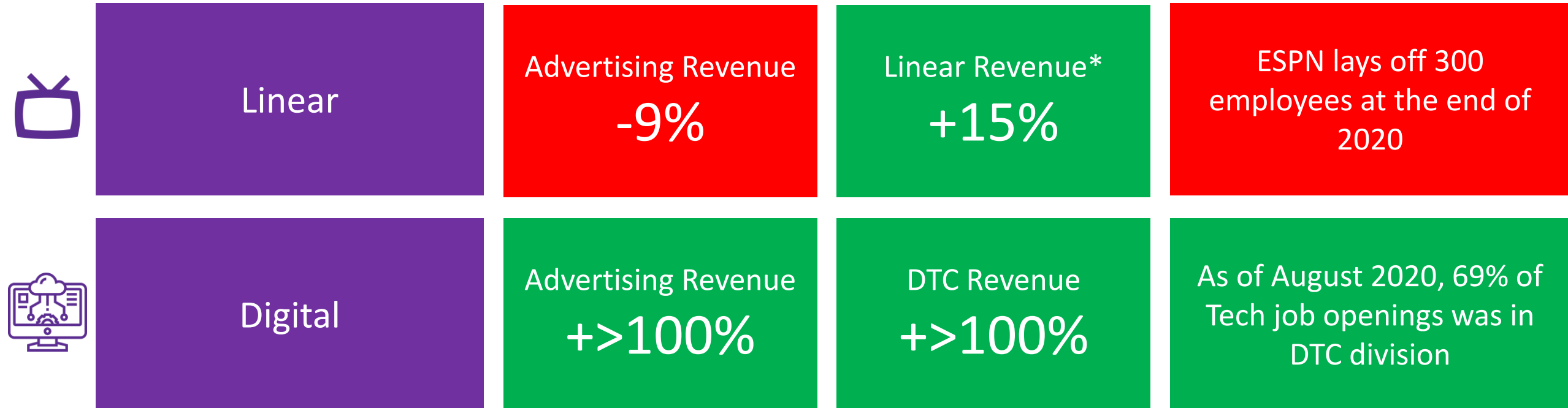
Sources: IABM, Company Filings

Media Business Models

Moving to digital offerings - Disney case study

FY 2020 Disney Revenue by division

Staff investment

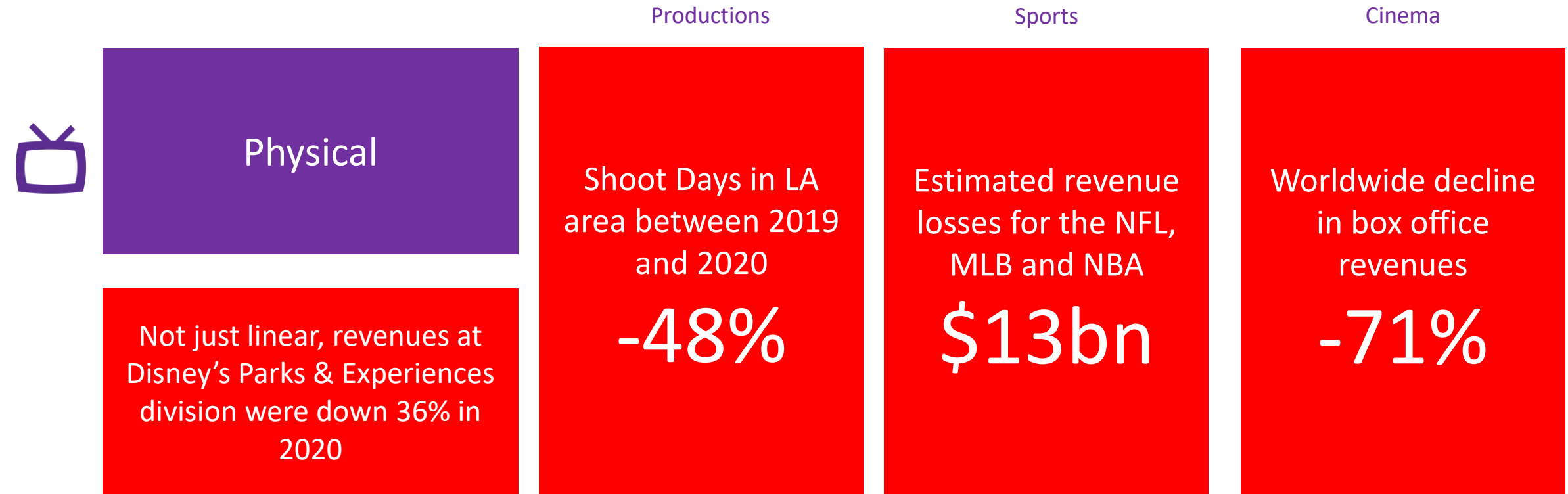


* Excluding advertising, driven mainly by affiliate fees

Sources: IABM, Company Filings

Media Business Models

Moving to digital offerings – Disruption to physical models adds pressure

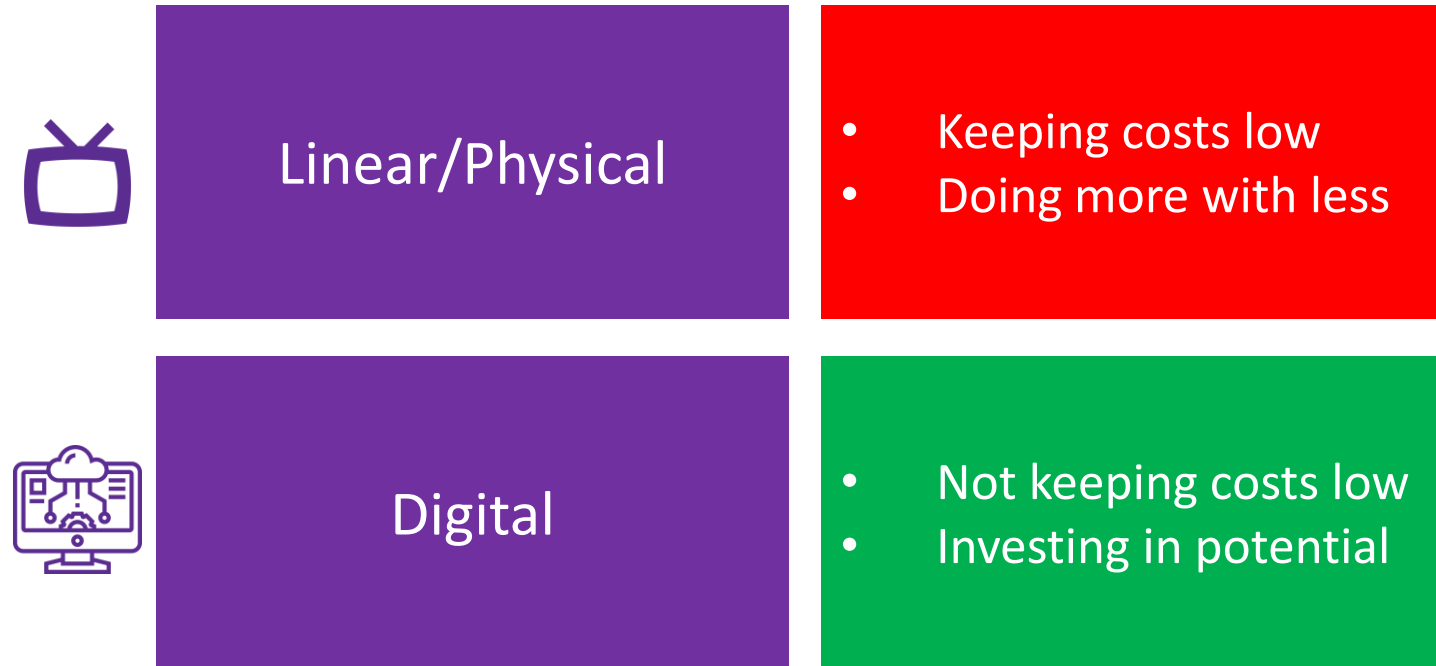


Sources: IABM, Bloomberg, Comscore

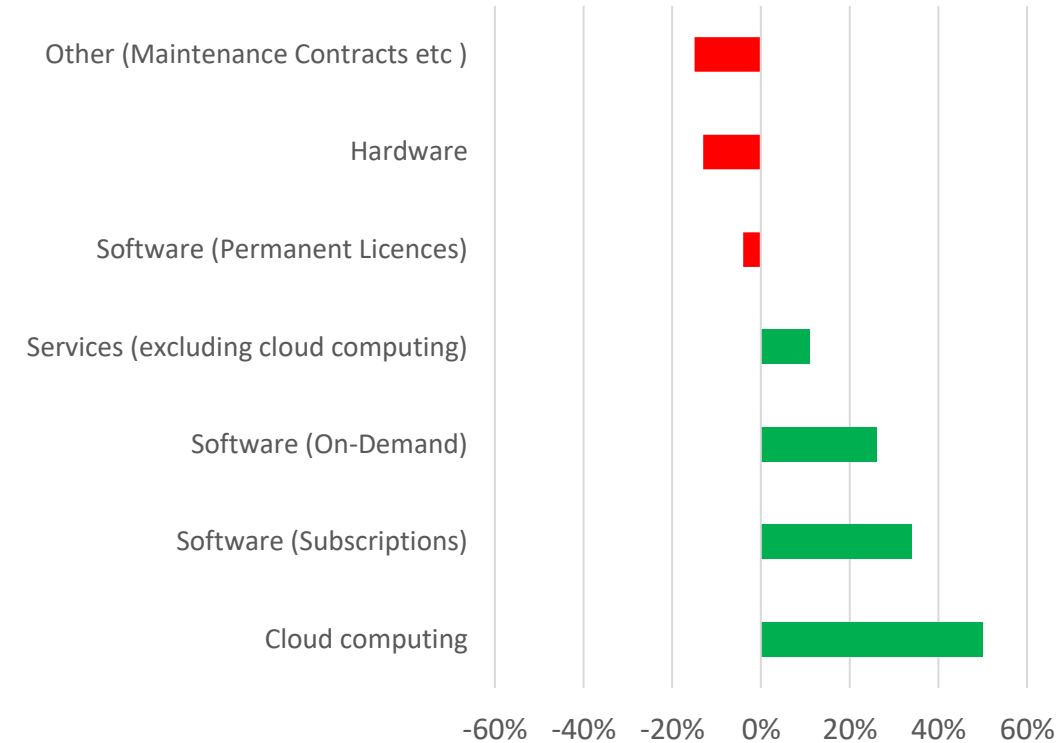
Digital Transformation

How does this translate into tech? Prioritization

Tech Decision-Making



Media tech investment outlook, NET difference in investment

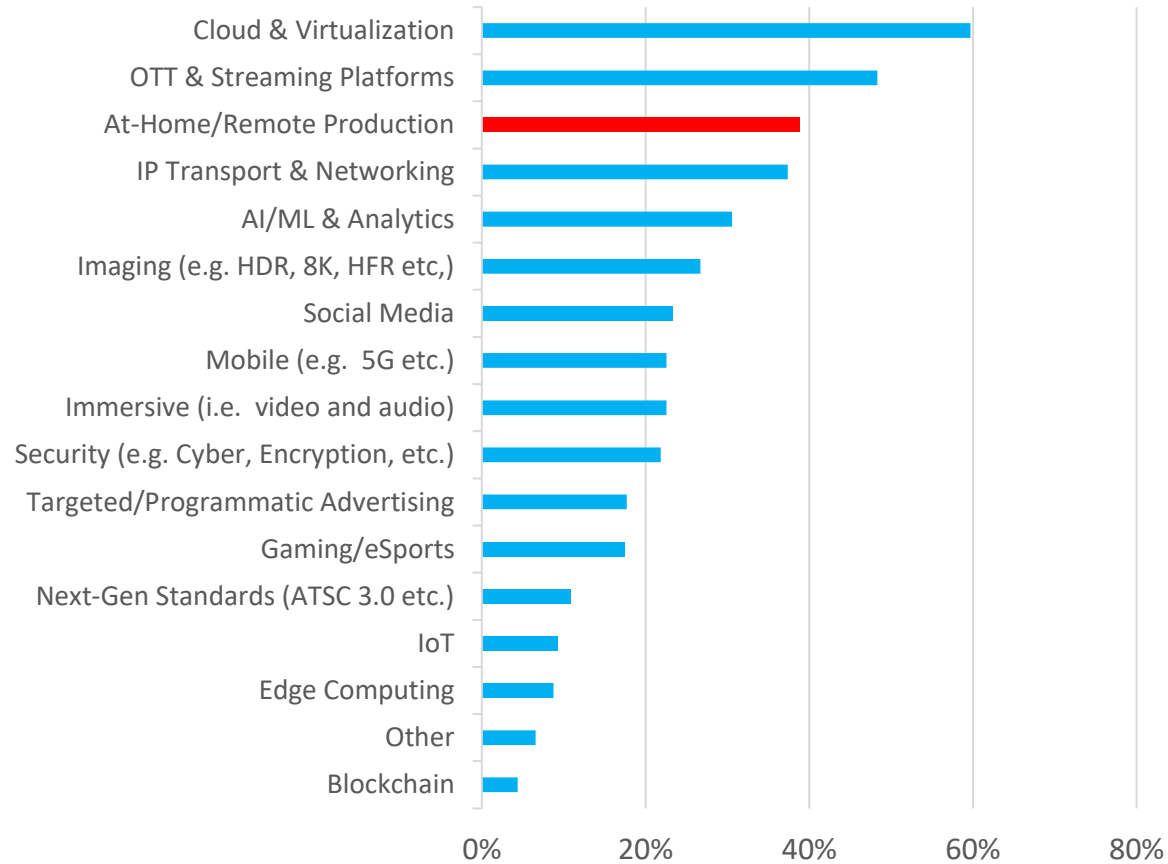


Sources: IABM

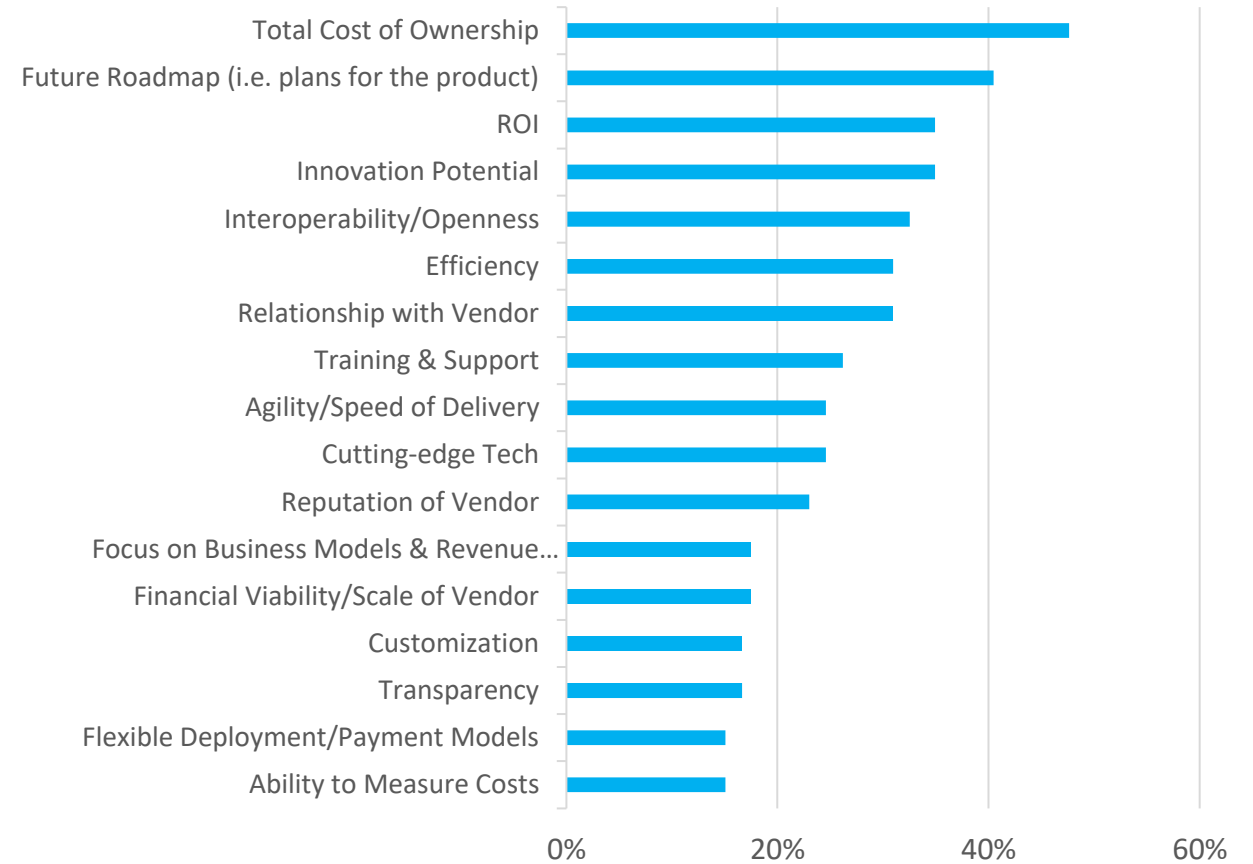
Media Tech Strategy & Preferences

Media tech priorities & preferences

Media tech roadmap priorities



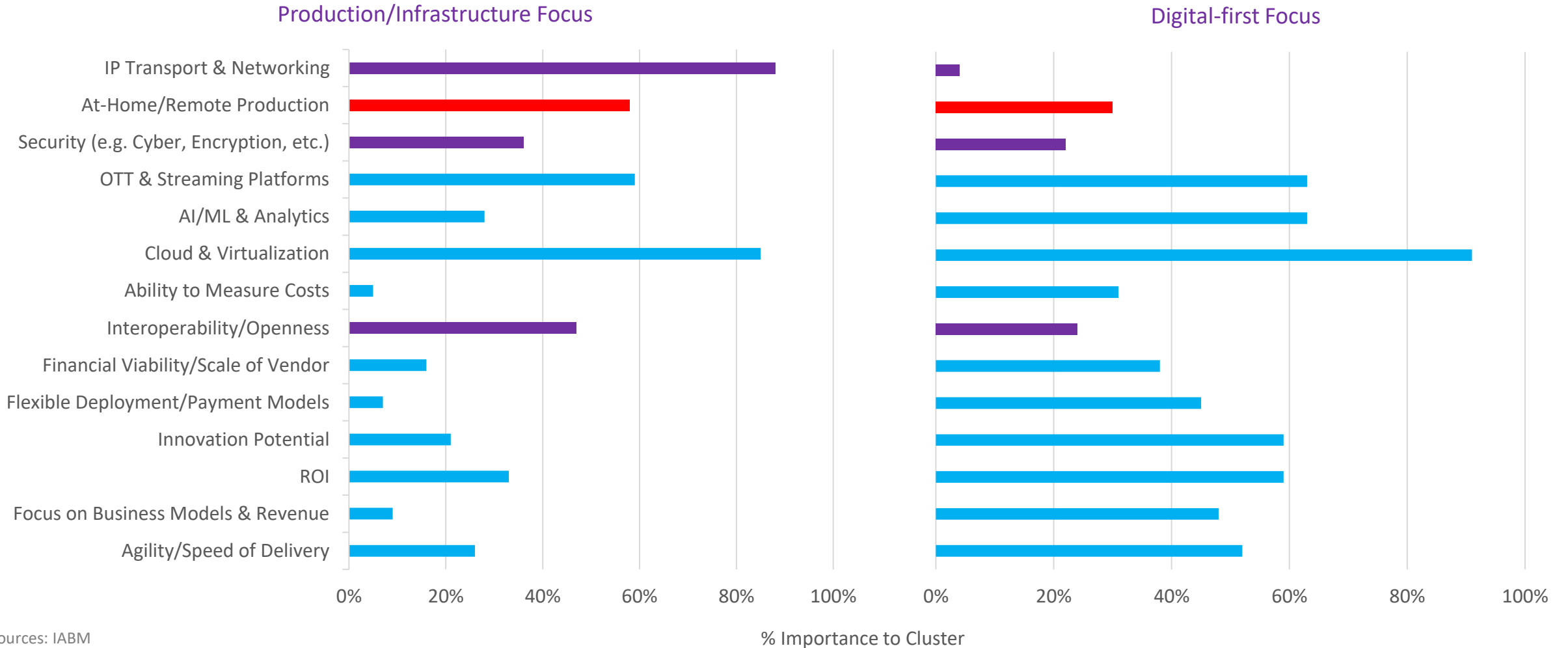
Media tech purchasing preferences



Sources: IABM

Media Tech Strategy & Preferences

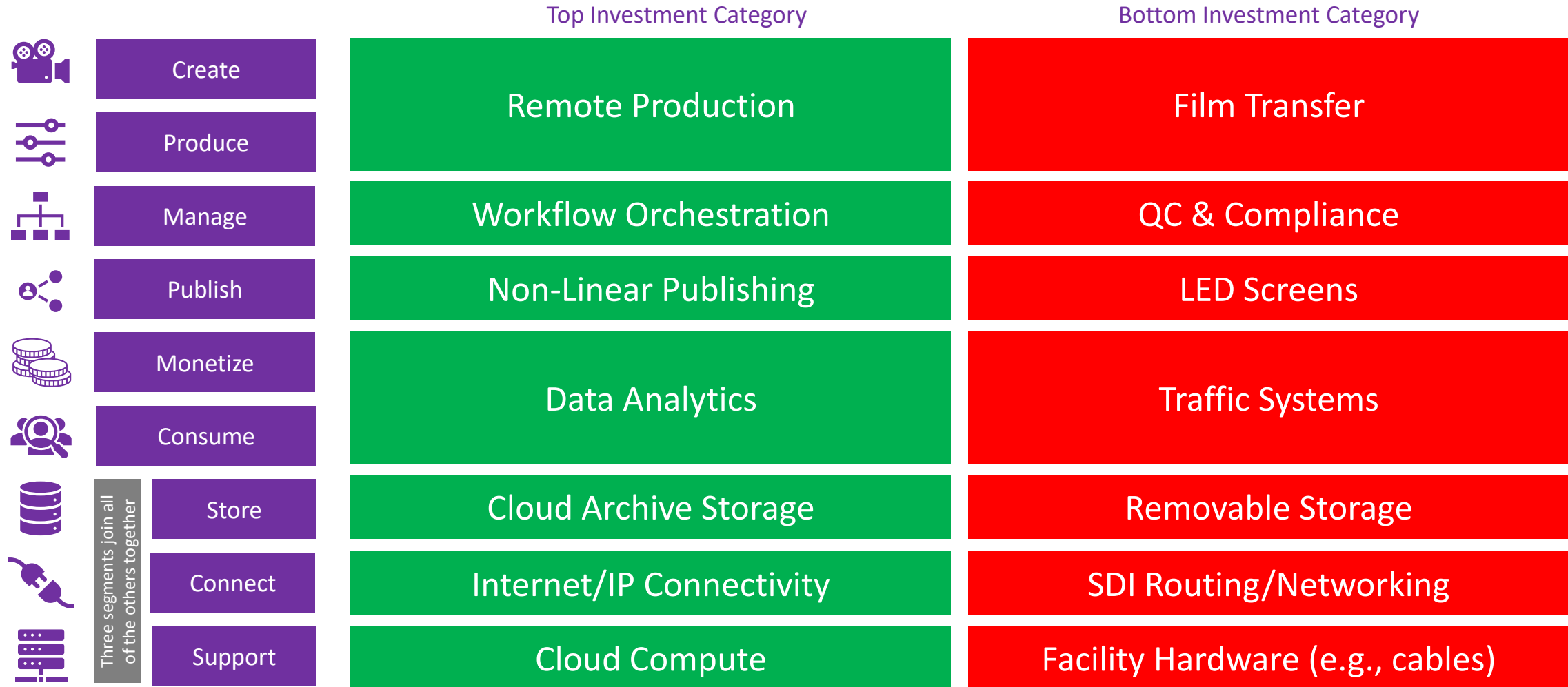
Delving deeper into the data, interactions between priorities & preferences



Sources: IABM

Media Tech Investment

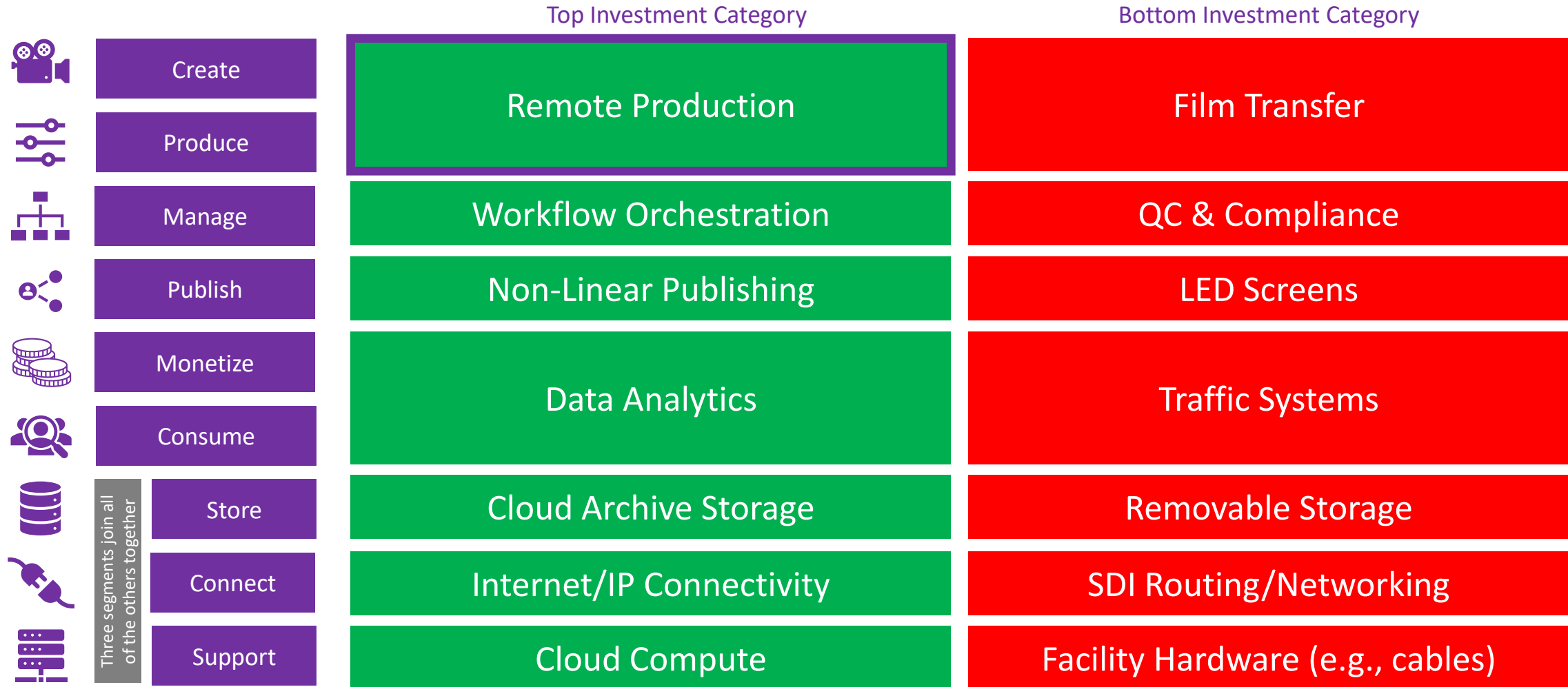
Media tech investment outlook by segment - COVID-19 effect



Sources: IABM

Remote Production Investment

Media tech push for providing focused/comprehensive ecosystems

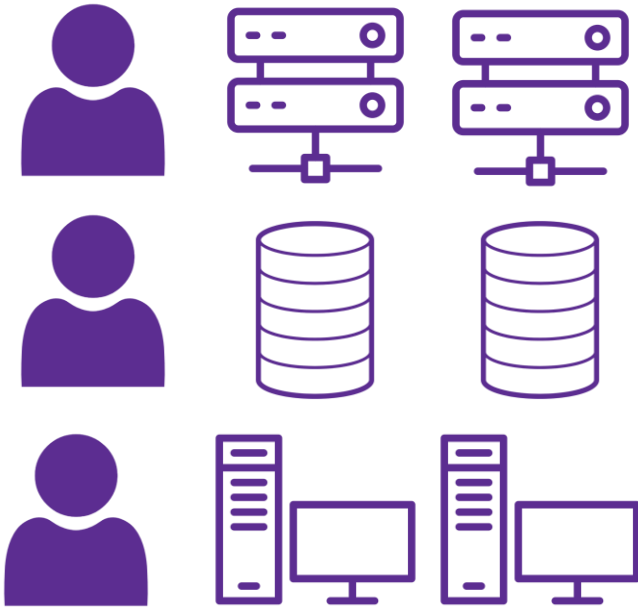


Sources: IABM

Remote Production Investment

COVID-19 effect – A simplified view

Pre-COVID Plans (Centralized Model)



ESPN

50%

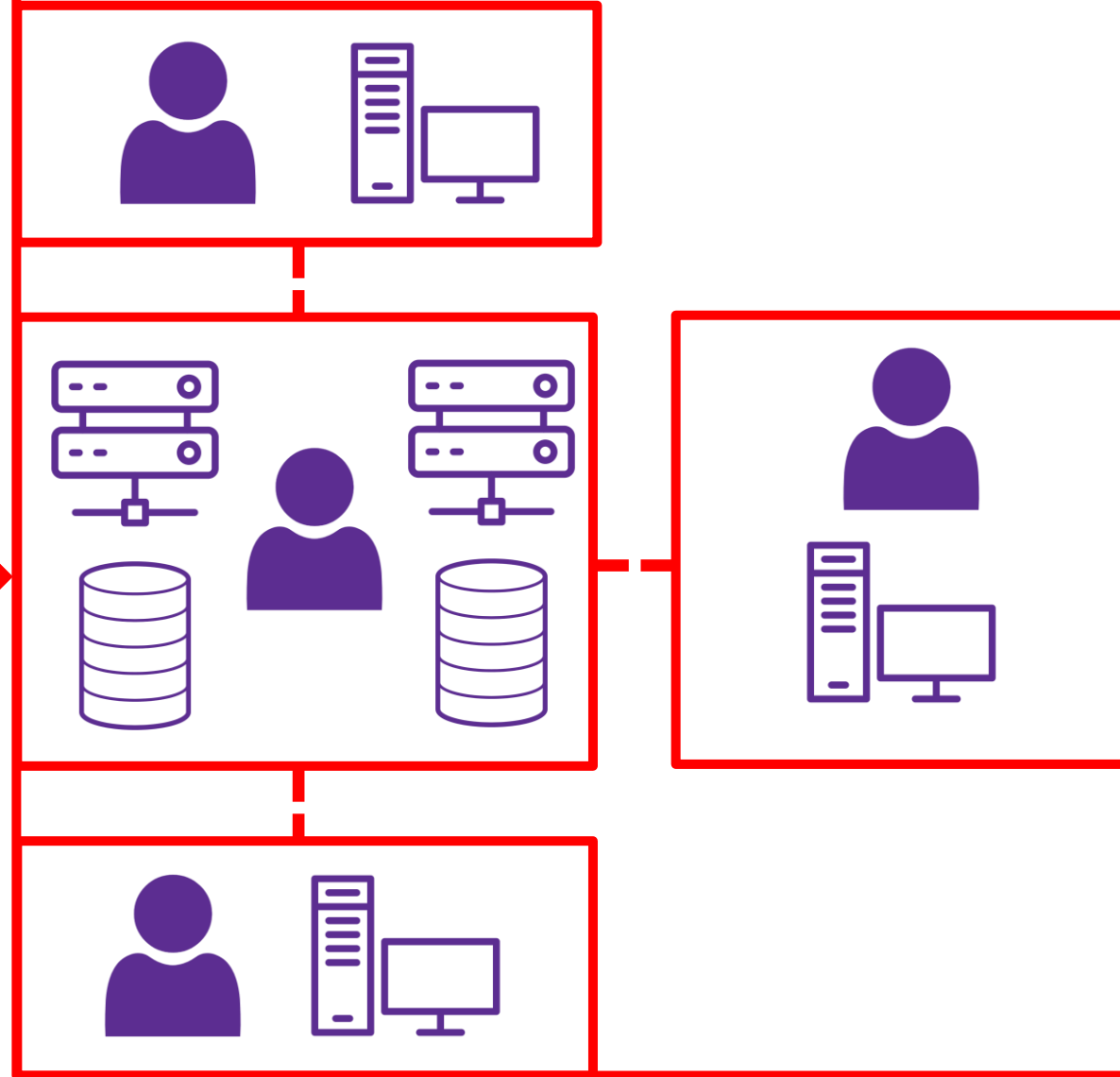
Remote Production Coverage
for Basketball Planned for
2021

Move to Remote Working

sky sports **EUROSPORT**

Increasing
remote production
investment

Post-COVID Reality (Decentralized Model)



Sources: IABM

Remote Production Investment

COVID-19 effect – Cloud investment

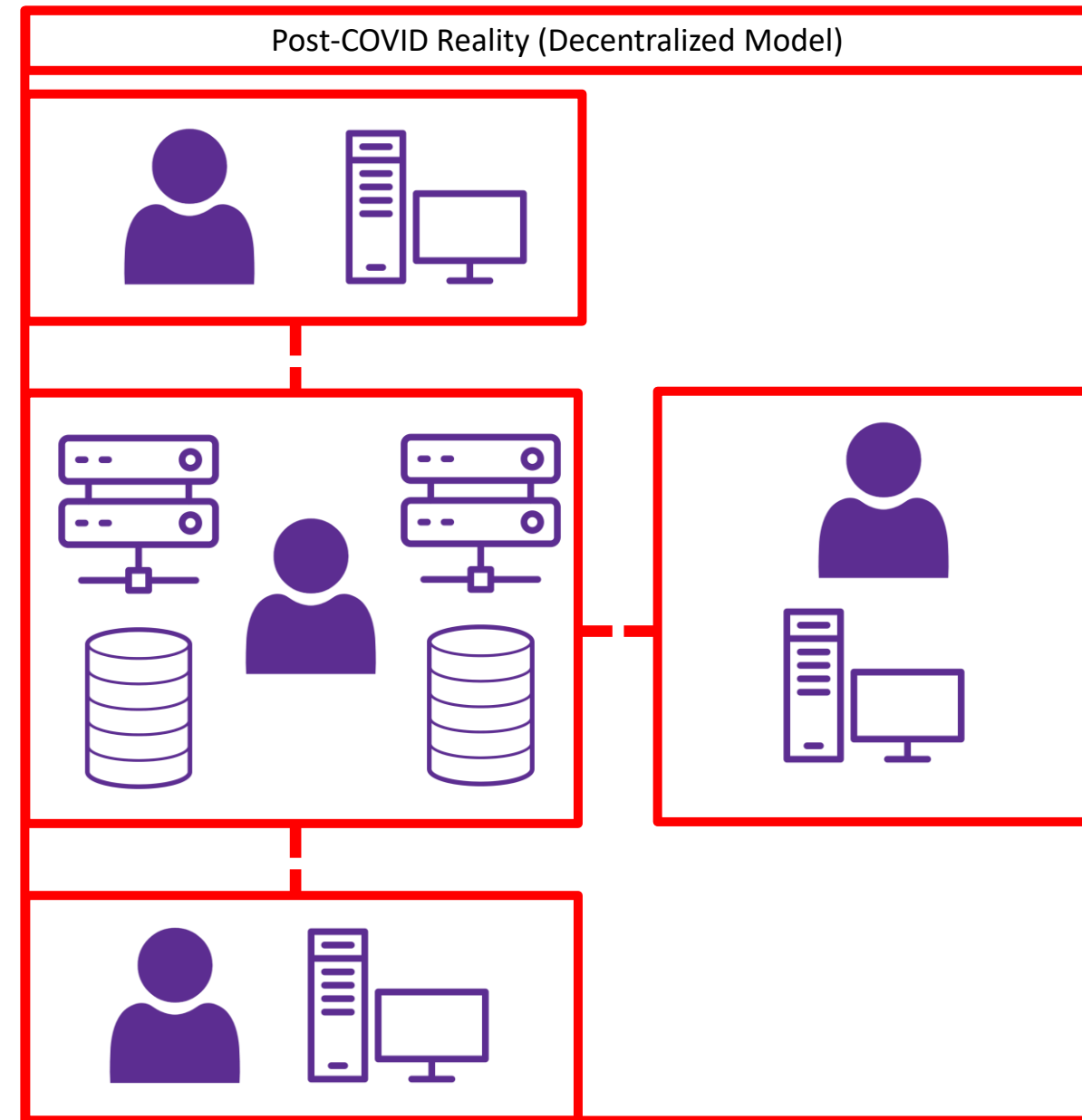
Blizzard moves to cloud-based remote production

“We are **now 100% in the cloud**; there is **no physical infrastructure** whatsoever in terms of switchers or audio consoles. The **only physical hardware** is people’s **computers, cameras, microphones, and a comms panel**.

Other than that, there’s absolutely no physical infrastructure required.”

Pete Emminger
VP, global broadcast
Activision Blizzard Esports
(April 2020)

Sources: IABM



Remote Production Investment

COVID-19 effect – Eurosport case study

Move on-prem workflows to private cloud



Gradually transition to public cloud

Demand for truly cloud-native tools in different workflow areas that enable live remote production

Eurosport in conversation with IABM

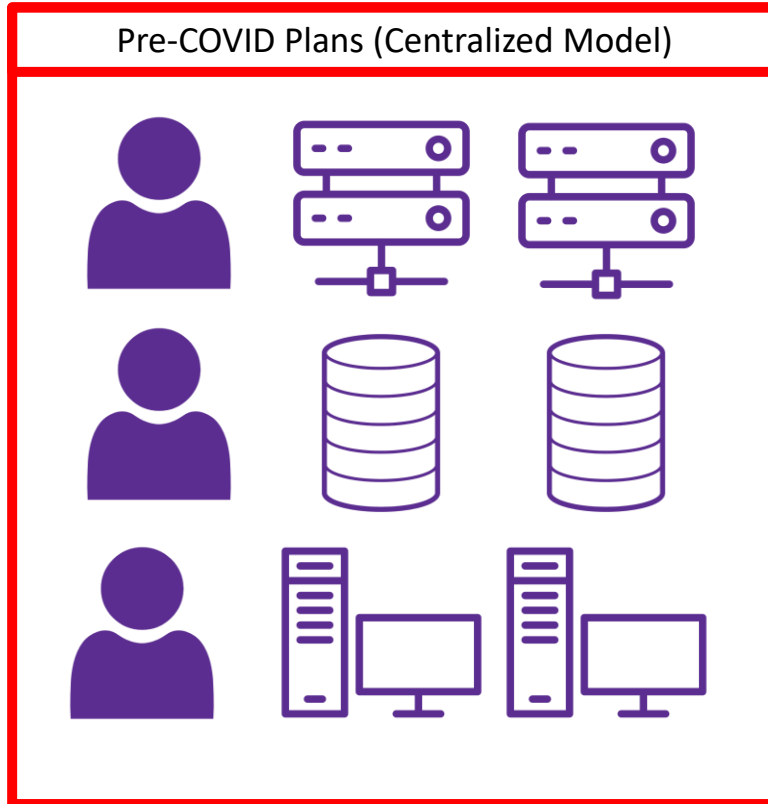
“It's interesting that we've seen faster advances in the video and graphics side than we have on audio”

Gordon Castle
SVP Technology
Eurosport
(March 2021)

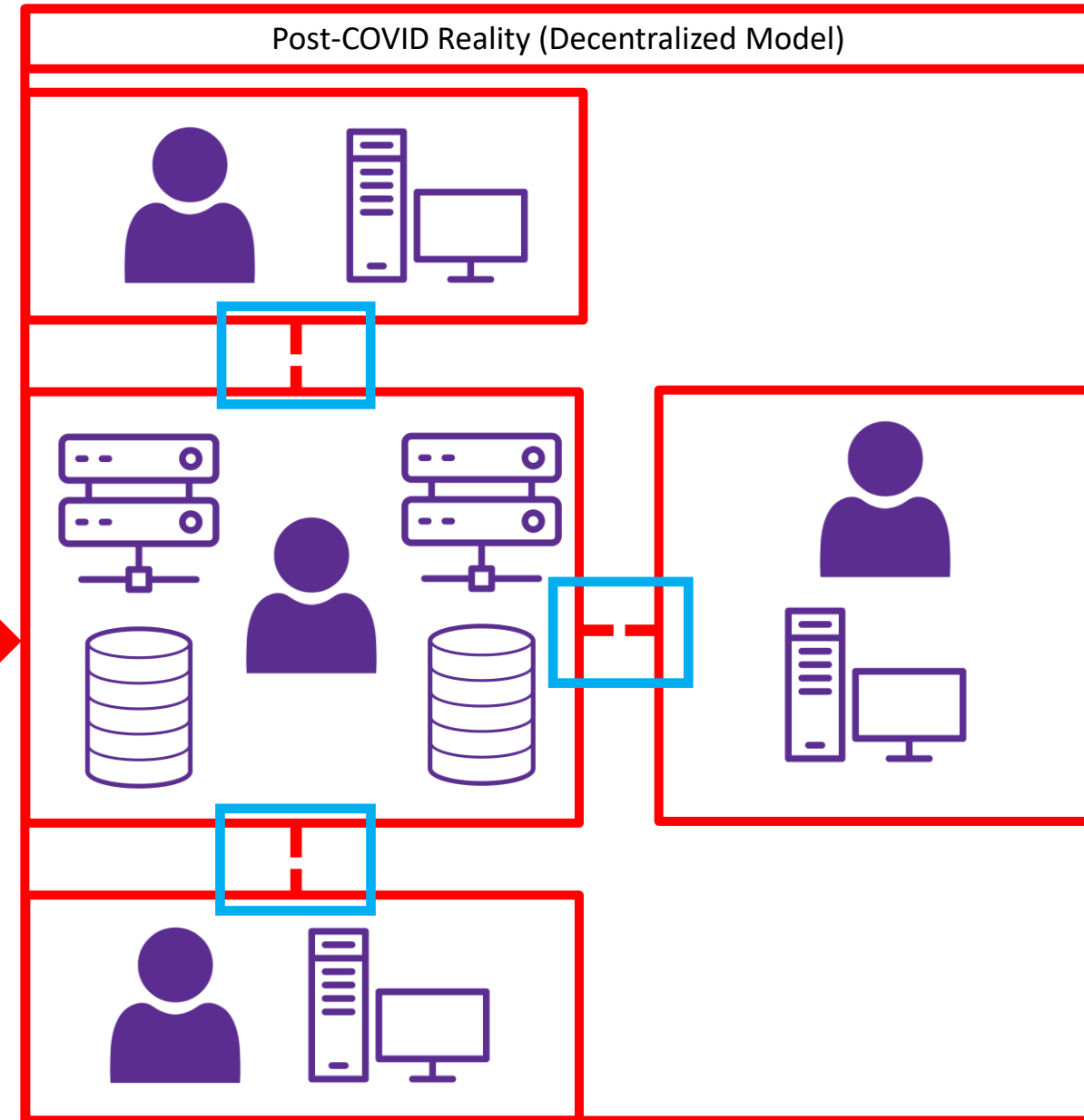
Sources: IABM

Remote Production Investment

COVID-19 effect – A simplified view



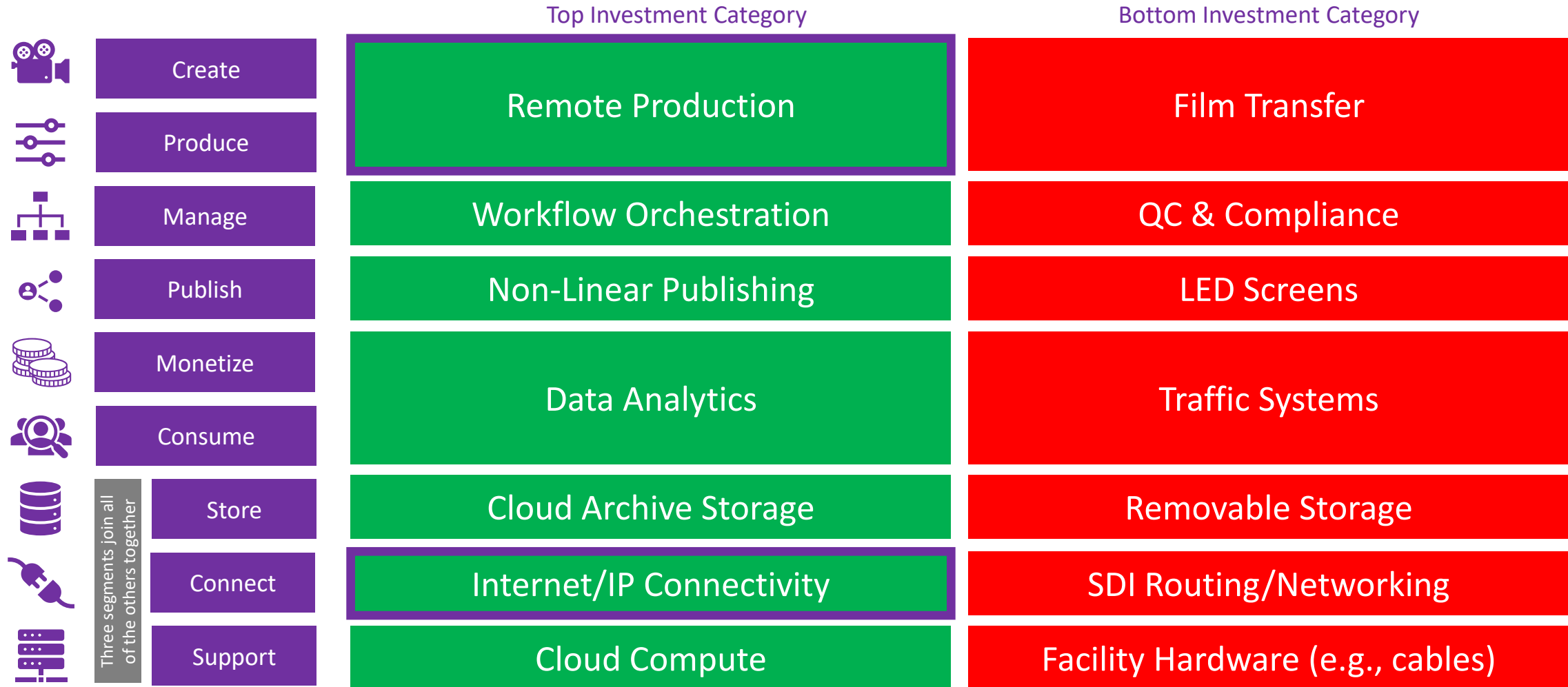
Move to Remote Working



Sources: IABM

Remote Production Investment

Media tech push for providing focused/comprehensive ecosystems



Sources: IABM

Remote Production Investment

Media tech push for providing focused/comprehensive ecosystems – Supply M&A



Acquires Axon in May 2020
“to deliver the most comprehensive media infrastructure solutions”

May 2020



Acquires Nevion in September 2020 and sells NMS and Memnon divisions in April 2021

Sep. 2020 – Apr. 2021



Sells ScheduALL to Xytech in February 2021 to focus on cloud, IP and remote production

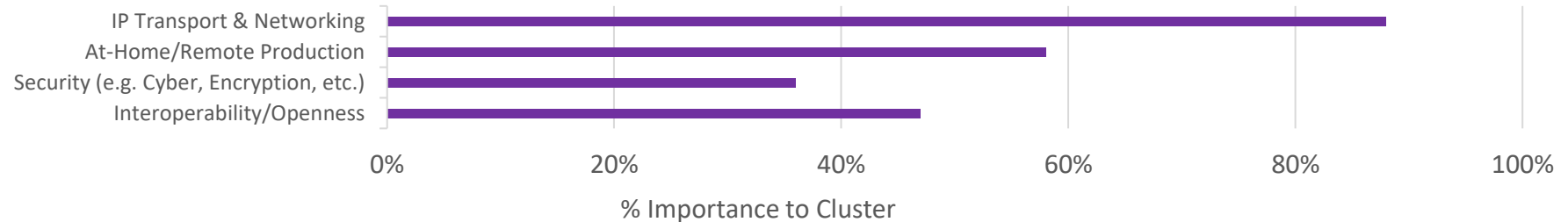
Feb. 2021



Acquires VISTA Worldlink in March 2021 to “become a leader in Centralized (Remote) Production”

Mar. 2021

Production/Infrastructure Focus



Sources: IABM

Remote Production Investment

Media tech push for providing focused/comprehensive ecosystems – Supply M&A



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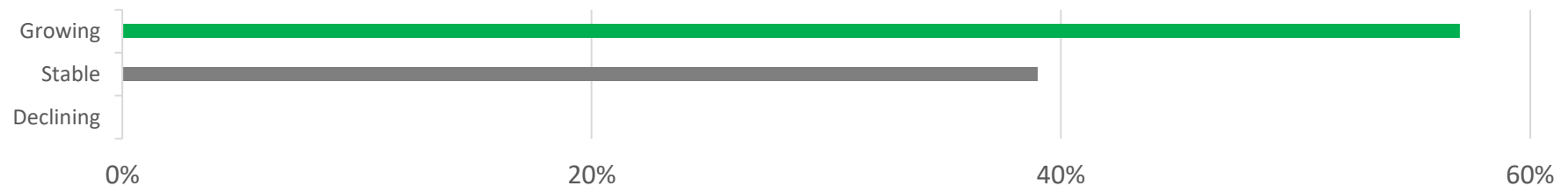


Acquires VISTA Worldlink in March 2021 to “become a leader in Centralized (Remote) Production”

Mar. 2021

Connect is top investment priority followed by Store and Support

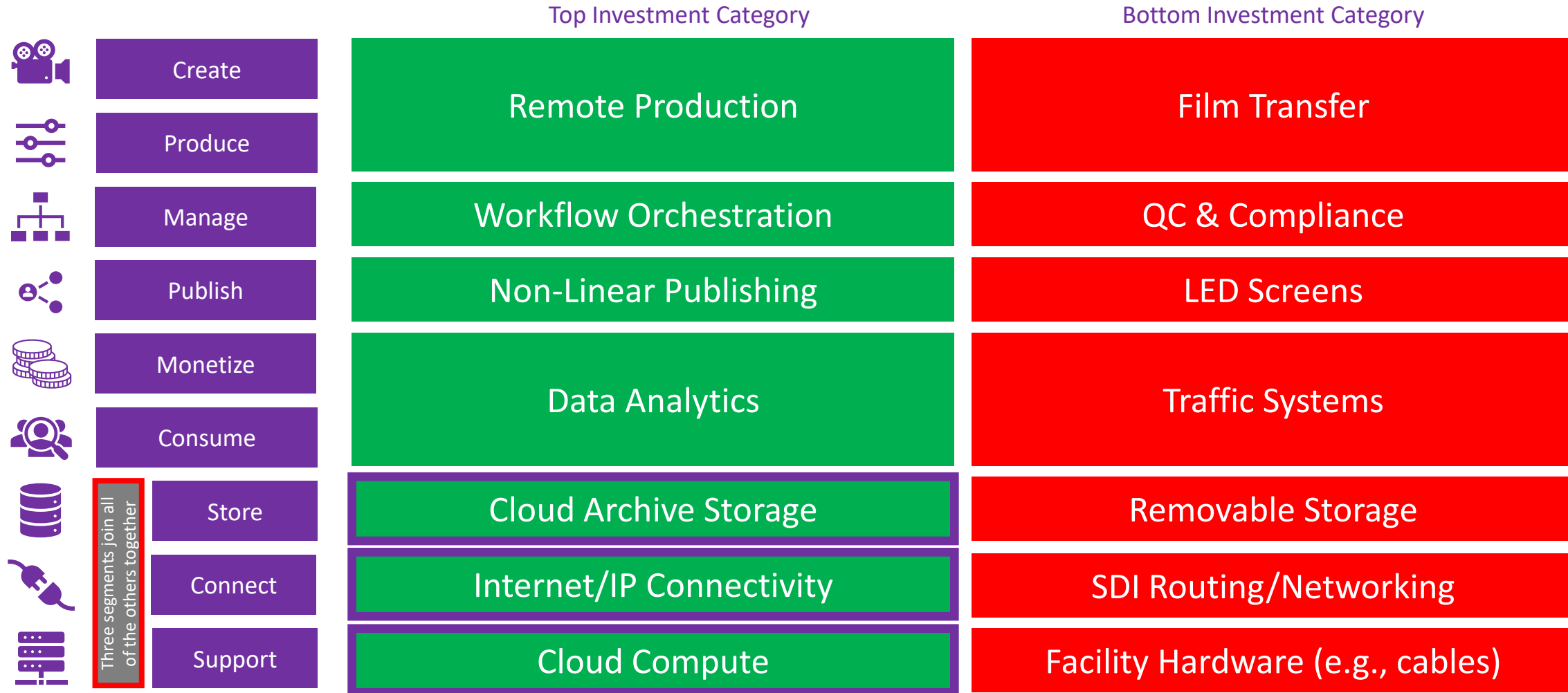
Connectivity investment outlook for companies ranking remote production as their top priority



Sources: IABM

Remote Production Investment

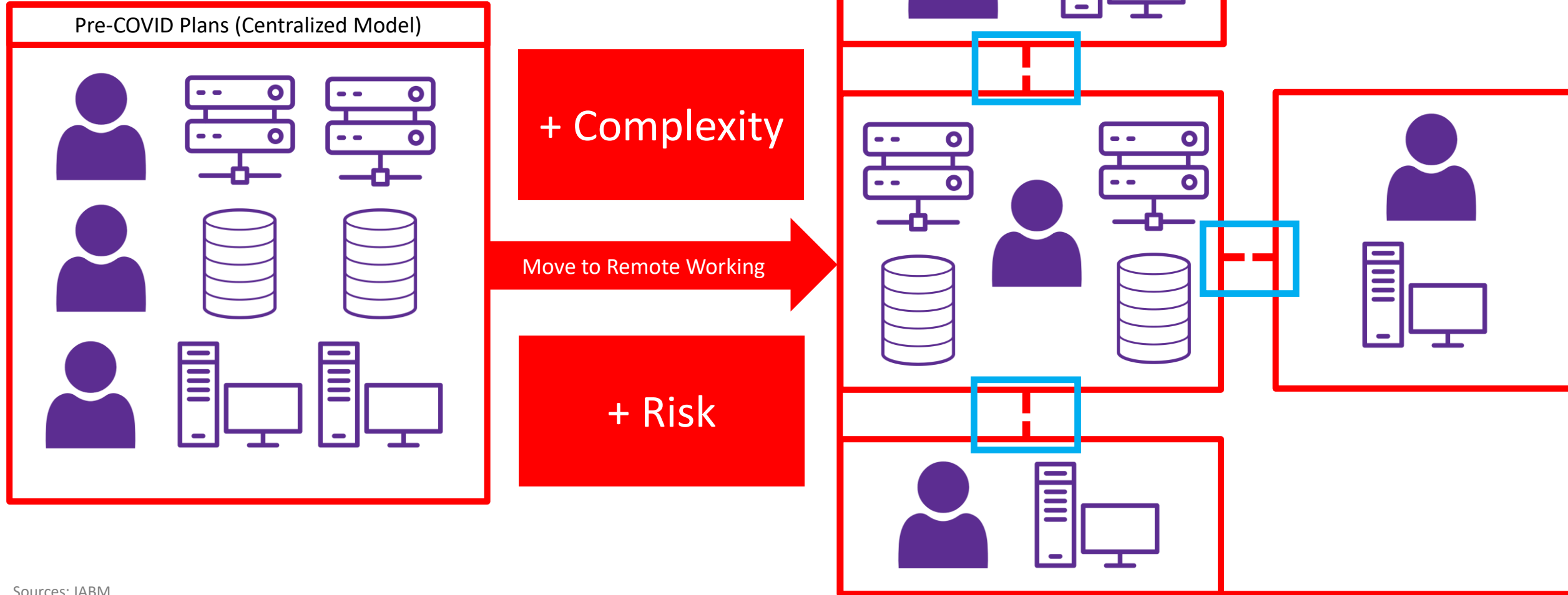
Media tech investment outlook by segment – focus on infrastructure



Sources: IABM

Remote Production Investment

COVID-19 effect – A simplified view



Sources: IABM

THANK YOU!!!

Email: lorenzo.zanni@theiabm.org