

Media Tech Intelligence Update at BaM LIVE!™ June 2021

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This is a collection of presentations that the IABM Insight & Analysis team delivered at at BaM LIVE!™ June 2021.

The presentation cover the topics listed below. You can click on the hyperlinks to jump straight to specific presentations.

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- [Digital Transformation in Media: The Stats](#)
- [Decentralized Production Models: Effects on Media Tech Investment](#)
- [Media Convergence: Current & Futuristic Perspectives](#)

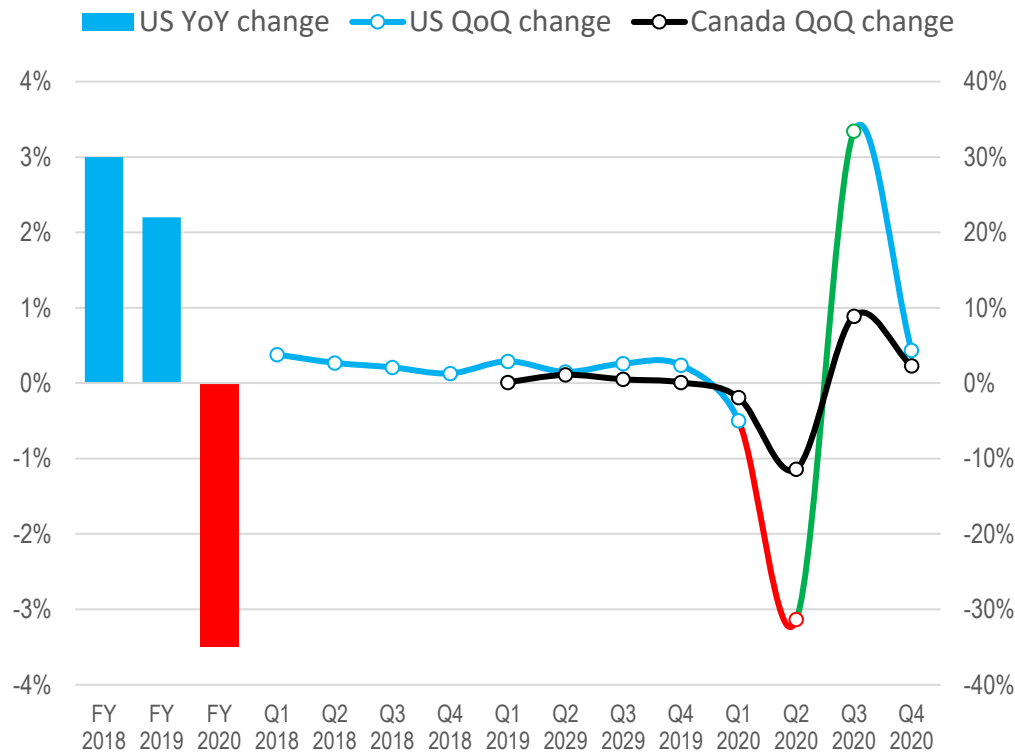
Americas Regional Trends

Olga Nevinchana, Senior Research Analyst, IABM

Business Environment in North America

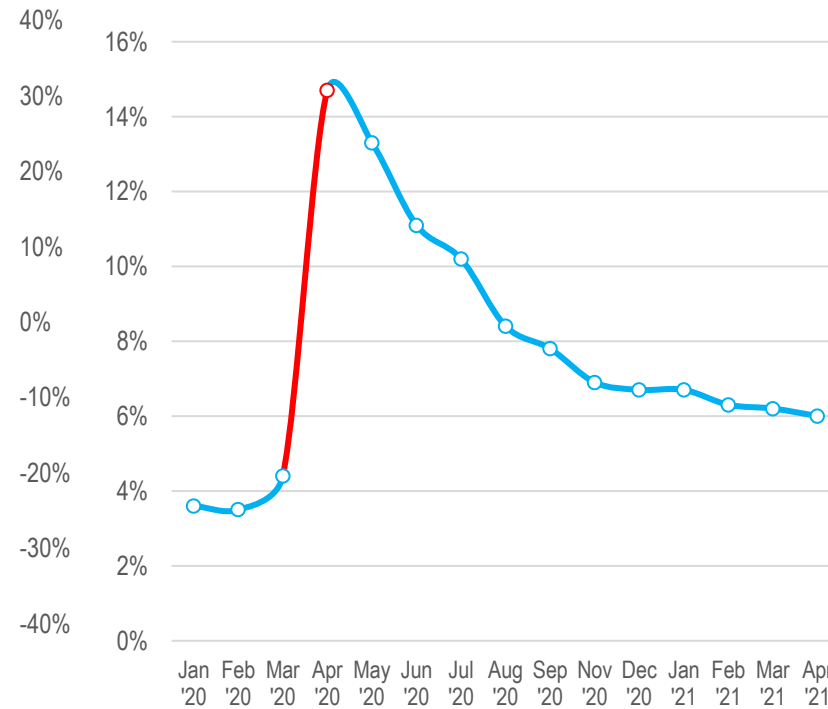
Overview

Quarterly GDP % change
in the US and Canada – 2018-2020



Sources: IABM, IMF

Monthly unemployment rate in the US



GDP change in 2020:



-3.5%



-5.4%



The government spending in response to COVID-19:

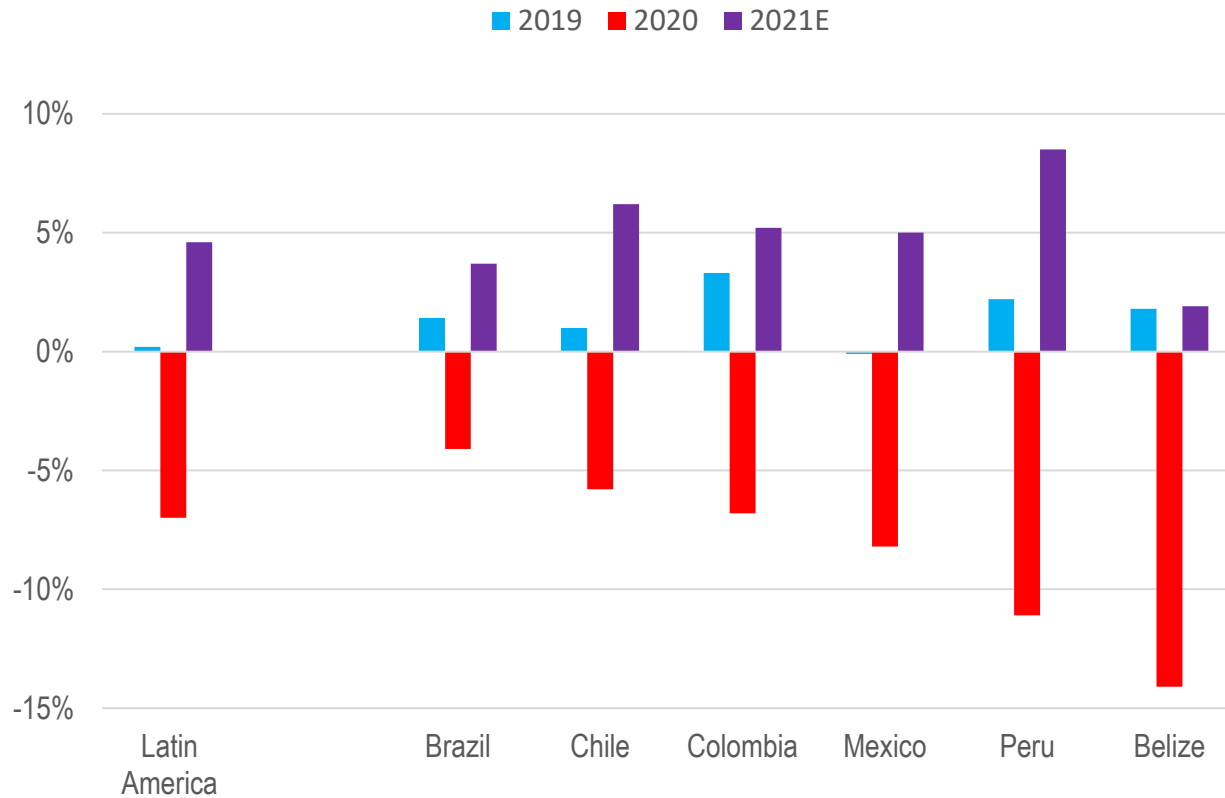
\$3.5 trillion
of the fiscal support package

\$1.9 trillion
of the COVID-19 relief bill

Business Environment in Latin America

Overview

Annual GDP % change by country in Latin America



-7%

Economic activity contracted by 7% in Latin America in 2020, according to IMF.

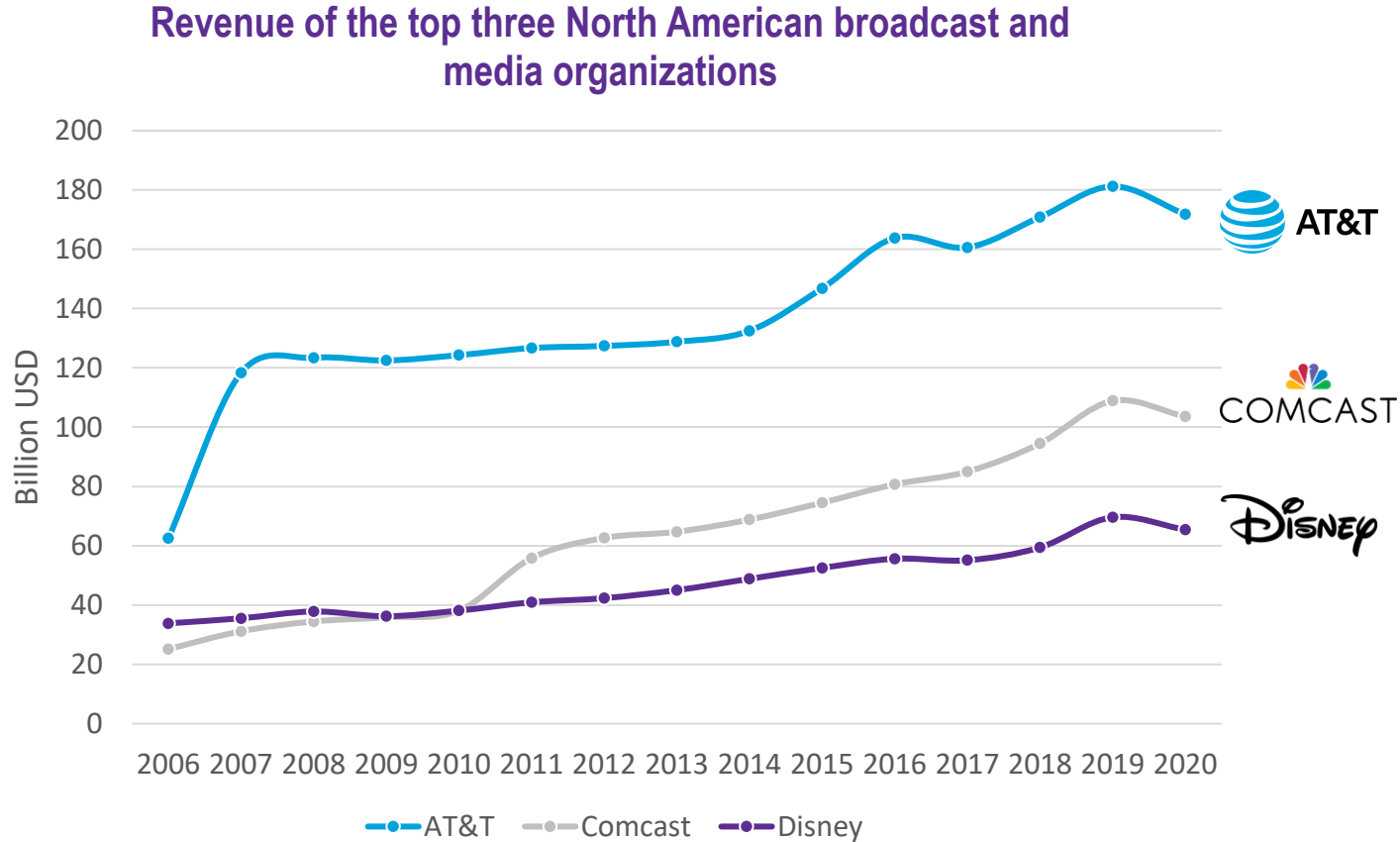
Fiscal limits of the region

The majority of Latin American countries do not have a similar fiscal space to more developed countries.

Sources: IABM, International Monetary Fund (IMF). Note: GDP 2021 estimates as of April 2021.

Pay-TV in Americas

North America is one of the largest broadcast and media markets



Sources: IABM, AT&T, Comcast, Disney

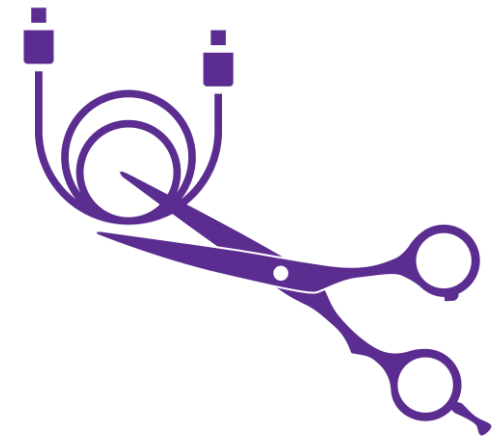
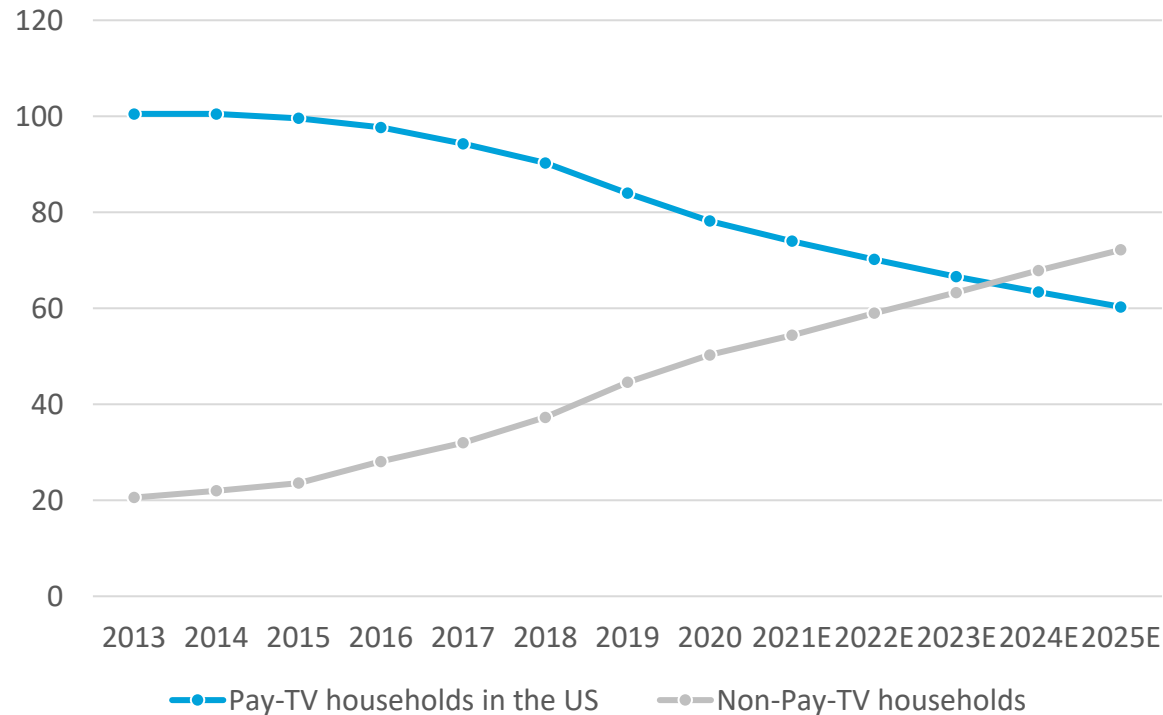


> \$340 billion
revenue in 2020

Pay-TV in Americas

Cord-cutting trend continues in the US

Number of Pay-TV households in the US

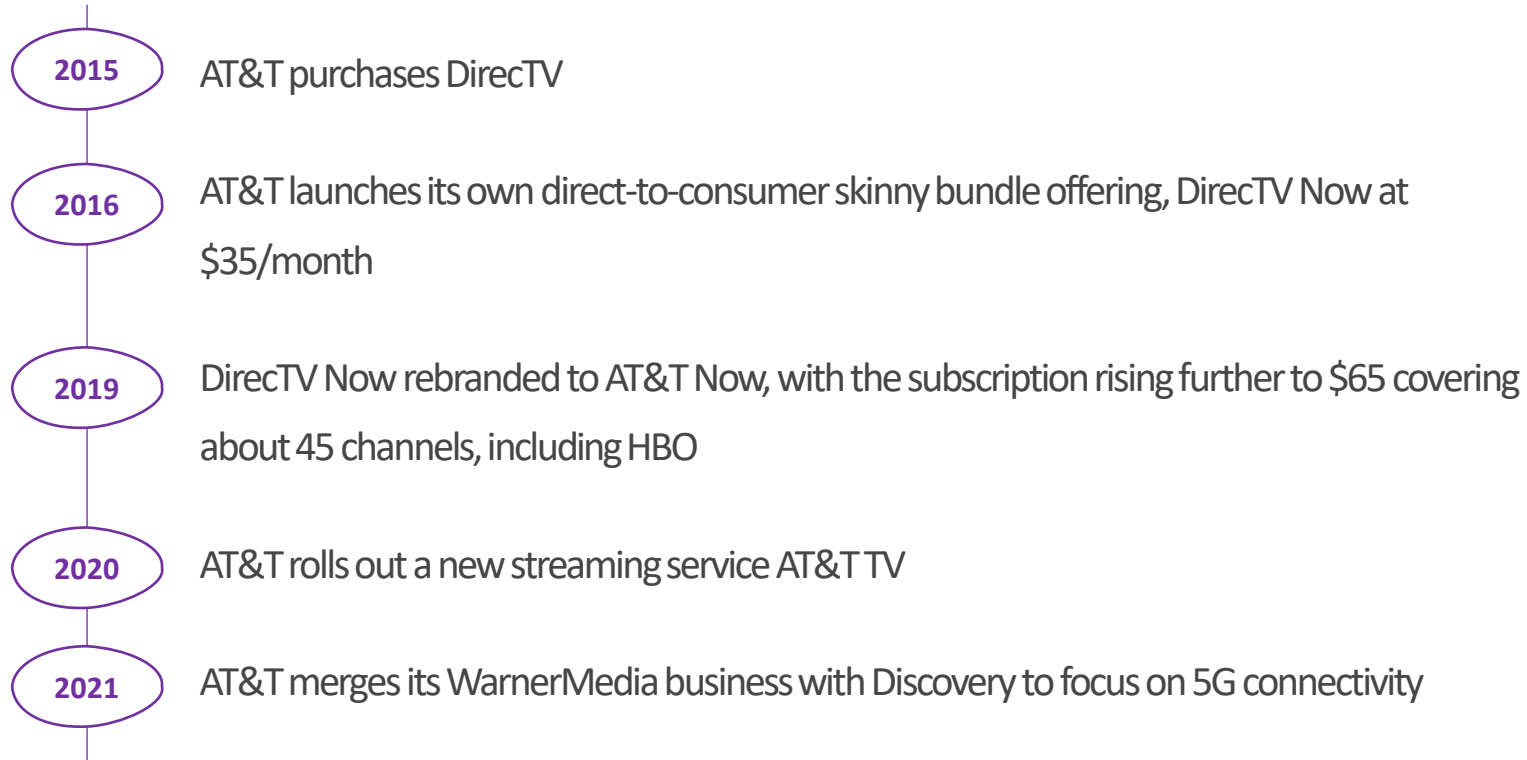


Sources: IABM

From Pay-TV to Streaming

North America: AT&T and Comcast

AT&T goes DTC



Sources: IABM, AT&T

”

We'll grow in our Pay-TV business with AT&T TV, coupled with a focus on our fiber broadband footprint driving incremental penetration



Jeffrey McElfresh, CEO,
AT&T Communications

From Pay-TV to Streaming

North America: WarnerMedia merges with Discovery

**WARNER
MEDIA**



John T. Stankey, AT&T Inc. CEO,
President & Director

”

This transaction brings together two entertainment leaders with complementary content strengths and positions the new company to be one of the leading global direct-to-consumer streaming platforms. The deal also provides AT&T with additional flexibility to invest in what I believe is an equally compelling opportunity, becoming the preeminent U.S. broadband provider.



Sources: IABM, AT&T

From Pay-TV to Streaming

North America: Disney

Disney, Disney+ going global

2017

Disney acquires a streaming technology provider, BAMTech

2018

Disney launches an ESPN-branded sports streaming service

Disney purchases Fox in a deal worth \$71.3bn (getting 39% of Sky)

2019

Disney launches its own subscription-based streaming service, Disney+, priced at \$7/month (or \$70/year)

2021

The number of Disney+ subscribers exceeds 100 million only a year after its launch

Sources: IABM, Disney



103.6 million

Subscribers as of 3 April 2021



230-260 million

Expected subscribers in 2024



2.83 billion

Operating losses in 2020



2023

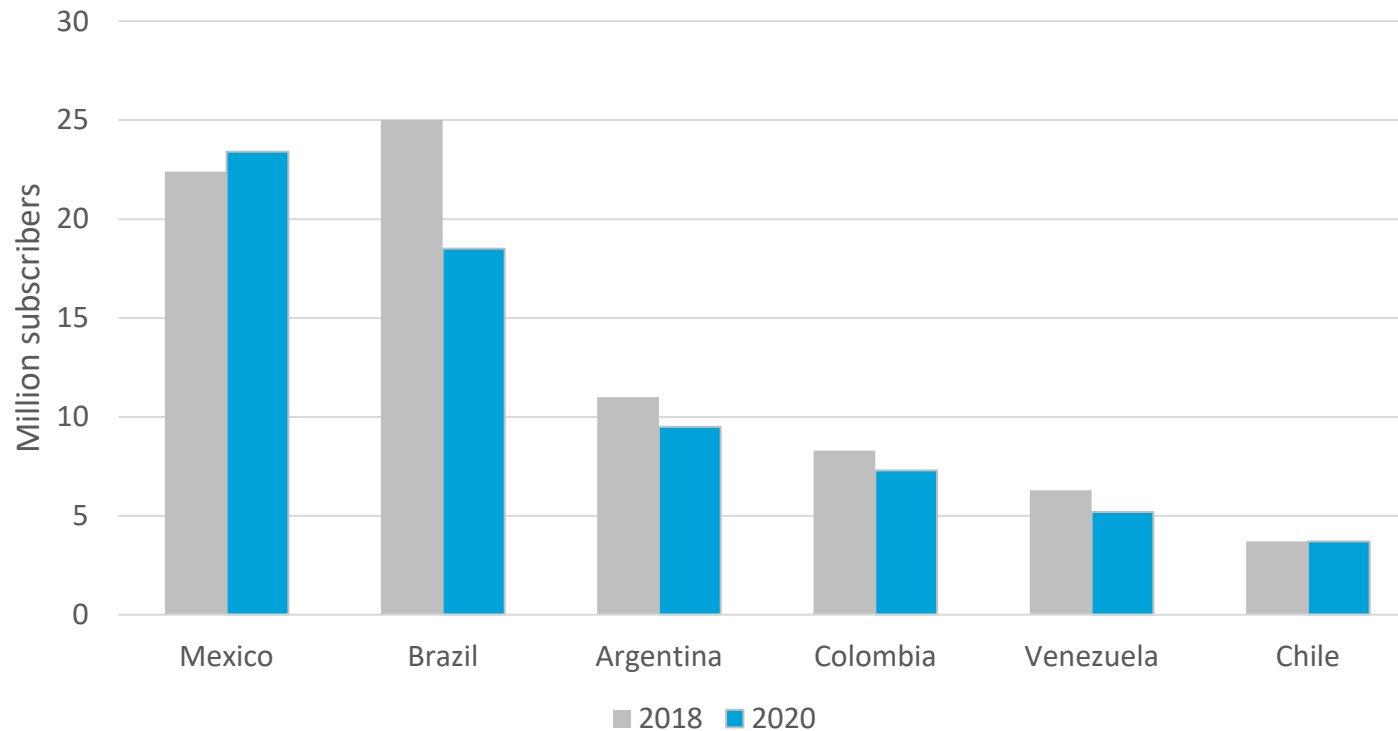
Expected year for first profit

Pay-TV in Americas

The Pay-TV sector in Latin America remains flat

Sources: IABM, Kantar Media

Pay-TV subscribers in six biggest markets in Latin America



Sources: IABM, Business Bureau

Low purchasing power

high level of income inequality

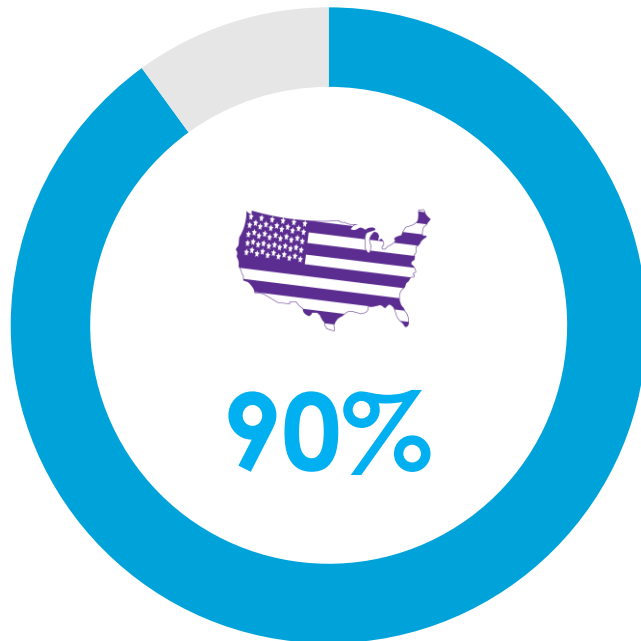
poor fixed-broadband infrastructure

easy-to-access illegal or free high-quality alternatives

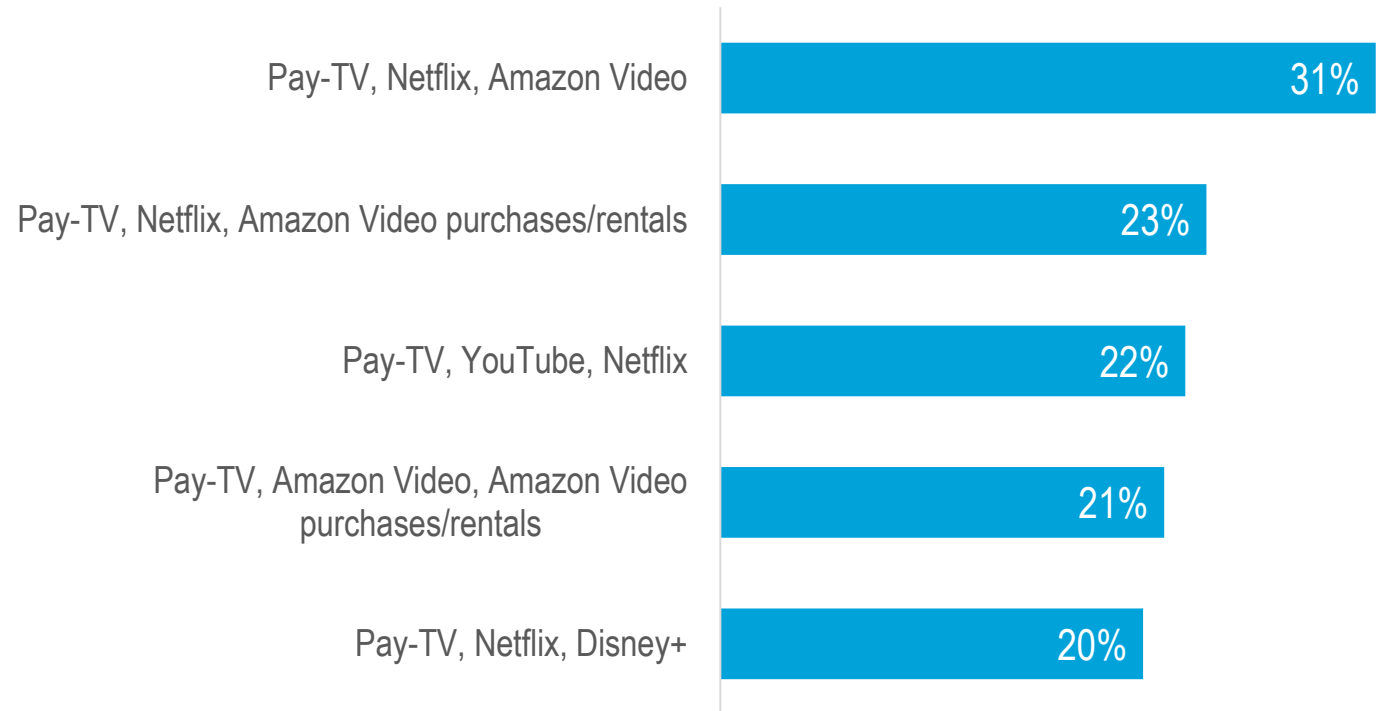
From Pay-TV to Streaming

North America: Netflix and Amazon are leading the streaming race

The US makes up 90% of the North American SVOD TV households



Top Bundles of three services in the US



Sources: IABM, TiVo, 2021

From Pay -TV to Streaming

North America: the resilience of sports rights



Sources: IABM

From Pay-TV to Streaming

Latin America



November 2019

SVOD service [GloboPlay](#) launched in Brazil. The OTT service reached 20 million subscribers in 2020, becoming the leading SVOD service in Brazil.



September 2020

[GloboPlay+](#) launched, a package with linear Pay-TV channels.



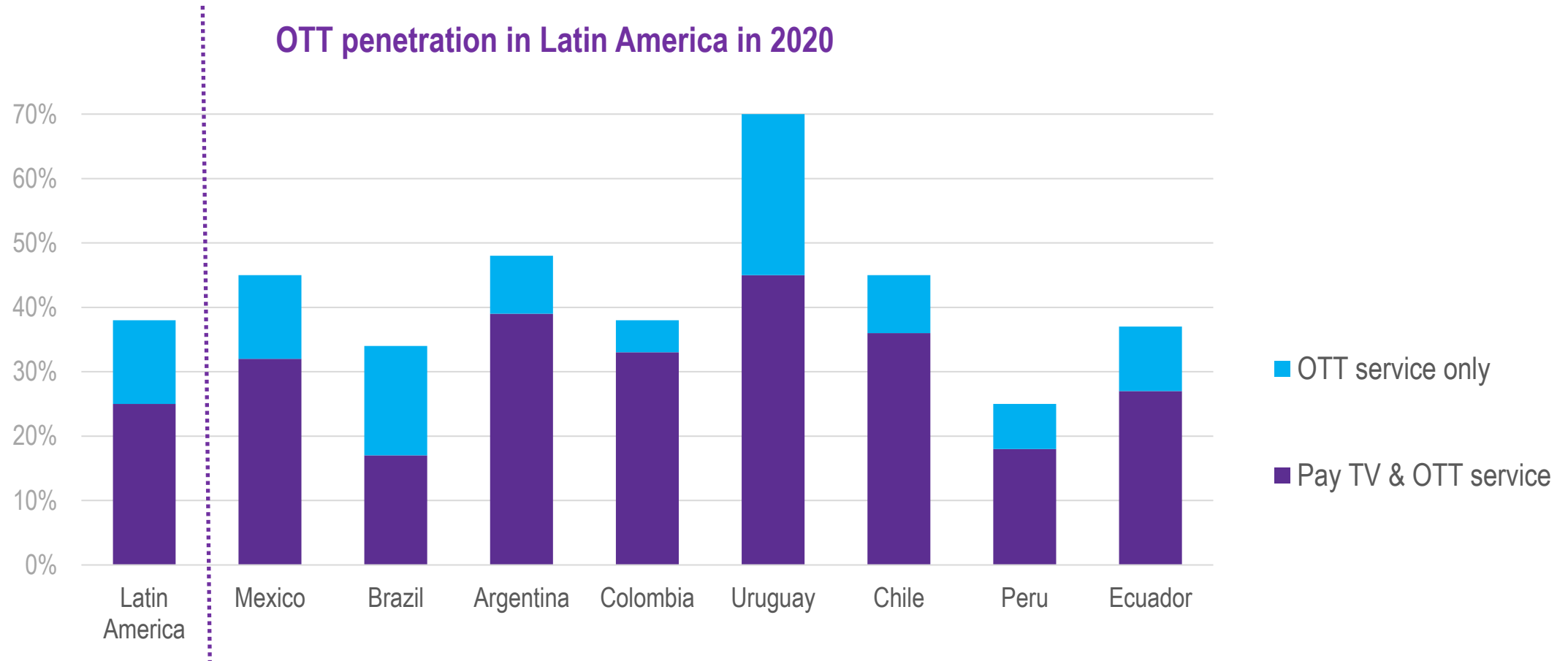
June 2021

Globo announced [Globo Partner Program](#) – a platform for US companies looking to expand to Latin American market.

Sources: IABM

From Pay -TV to Streaming

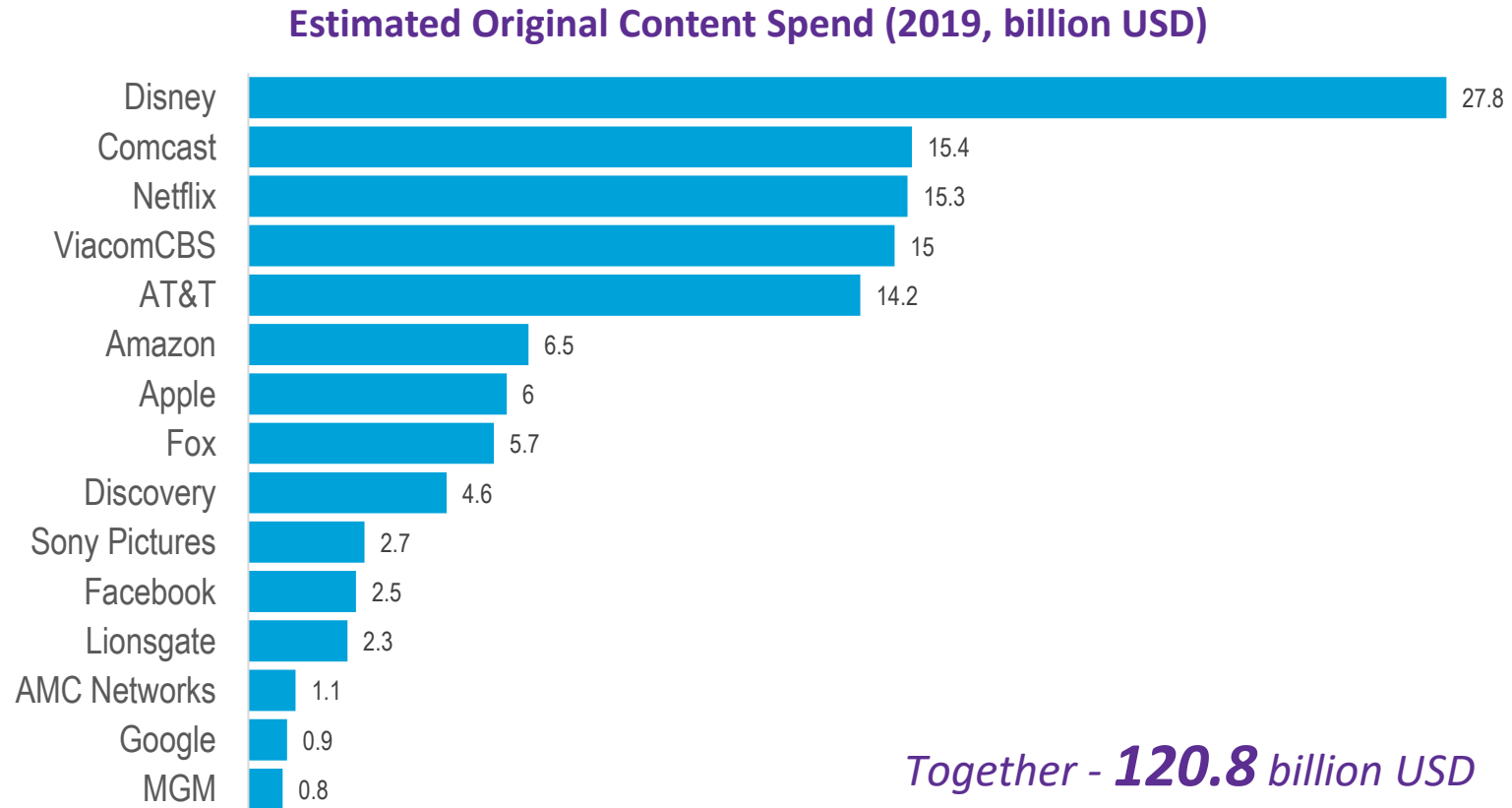
Latin America



Sources: IABM

Original Content Investment

North America



Transition to Digital Broadcasting

North America













July 2021



By 2022

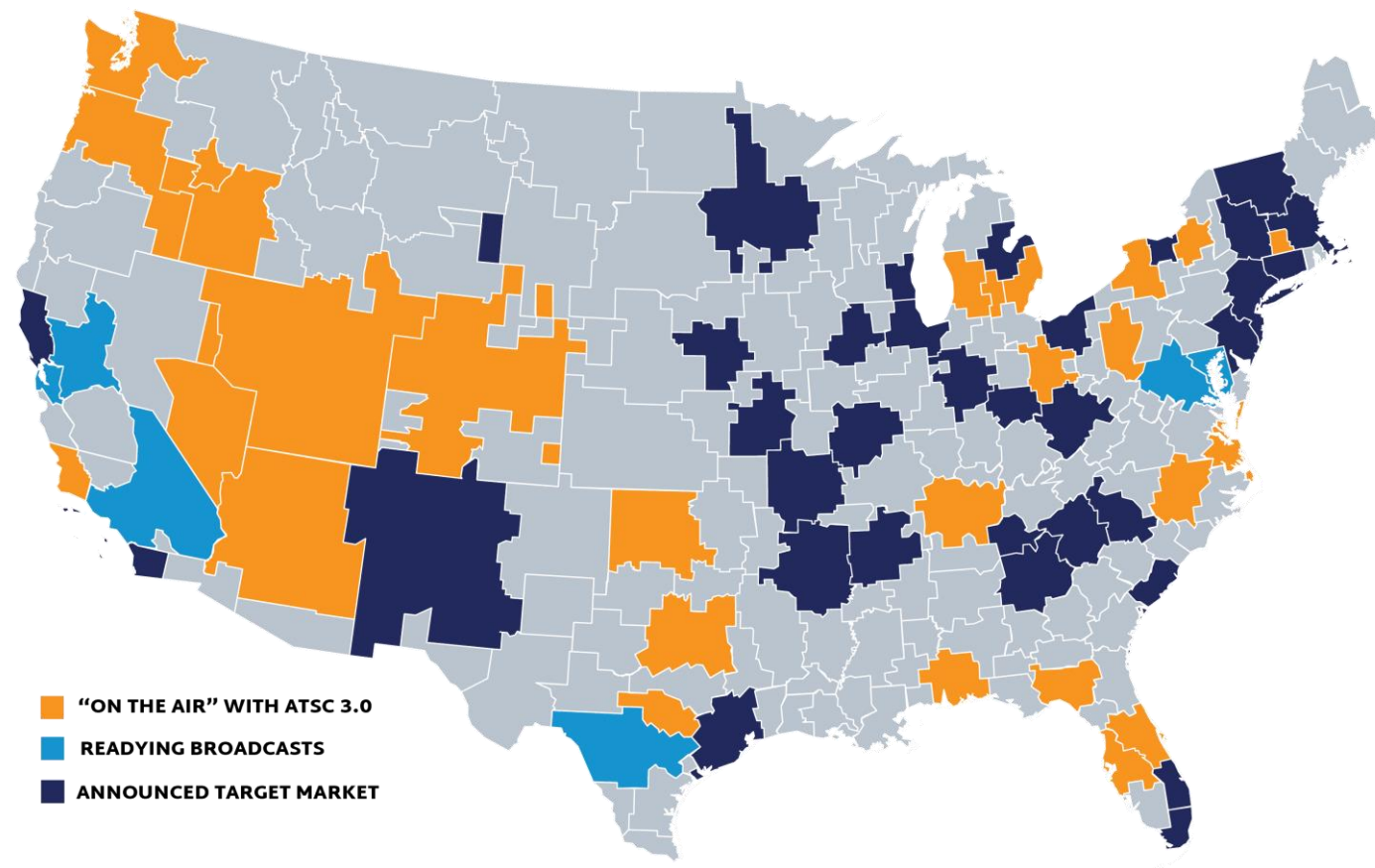
Transition to Digital Broadcasting

Latin America

	Country	Year of Launch	Target ASO Date	TV Standard	Status
	Mexico	2004	2018	ATSC	Completed
	Brazil	1999	2023	SBTVD (based on ISDB-T)	On-going
	Argentina	n.a.	2021	SATVD-T	On-going
	Chile	n.a.	2024 (requested to postpone till 2026)	n.a.	On-going
	Paraguay	n.a.	2021	n.a.	On-going
	Peru	n.a.	2024	n.a.	On-going
	Colombia	2009	2021	DVB-T	On-going
	Panama	n.a.	n.a.	DVB-T	On-going
	Suriname	n.a.	n.a.	DVB-T	On-going
	Guyana	n.a.	n.a.	DVB-T	On-going

Transition to ATSC 3.0

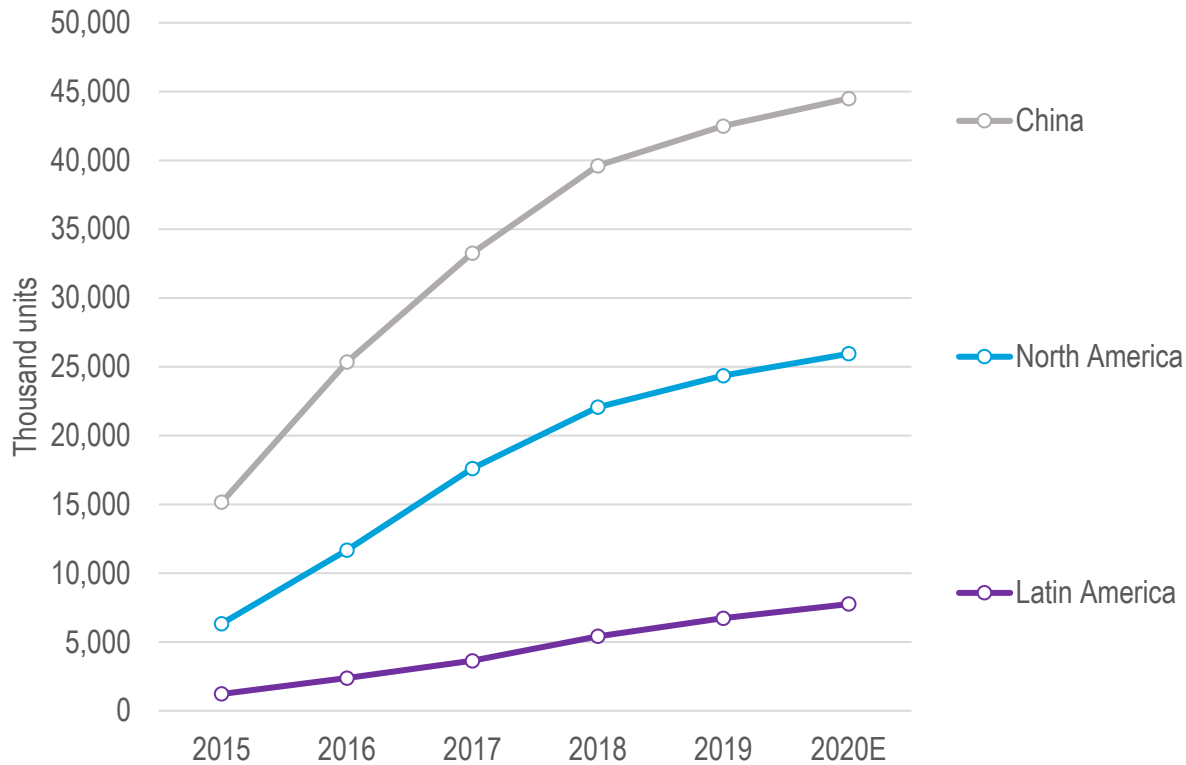
North America



Transition to New Viewing Experiences

North America

4K UHD TV shipments in selected countries



”

And remote integration is now the No. 1 technology priority, and the quality of the signal has taken a lower interest. I don't think it has disappeared, but it's just that everybody is trying to execute more efficient workflows using IP and remote integration.”

Hugo Gaggioni,
CTO of Media Solutions for Sony Electronics

Transition to New Viewing Experiences

North America

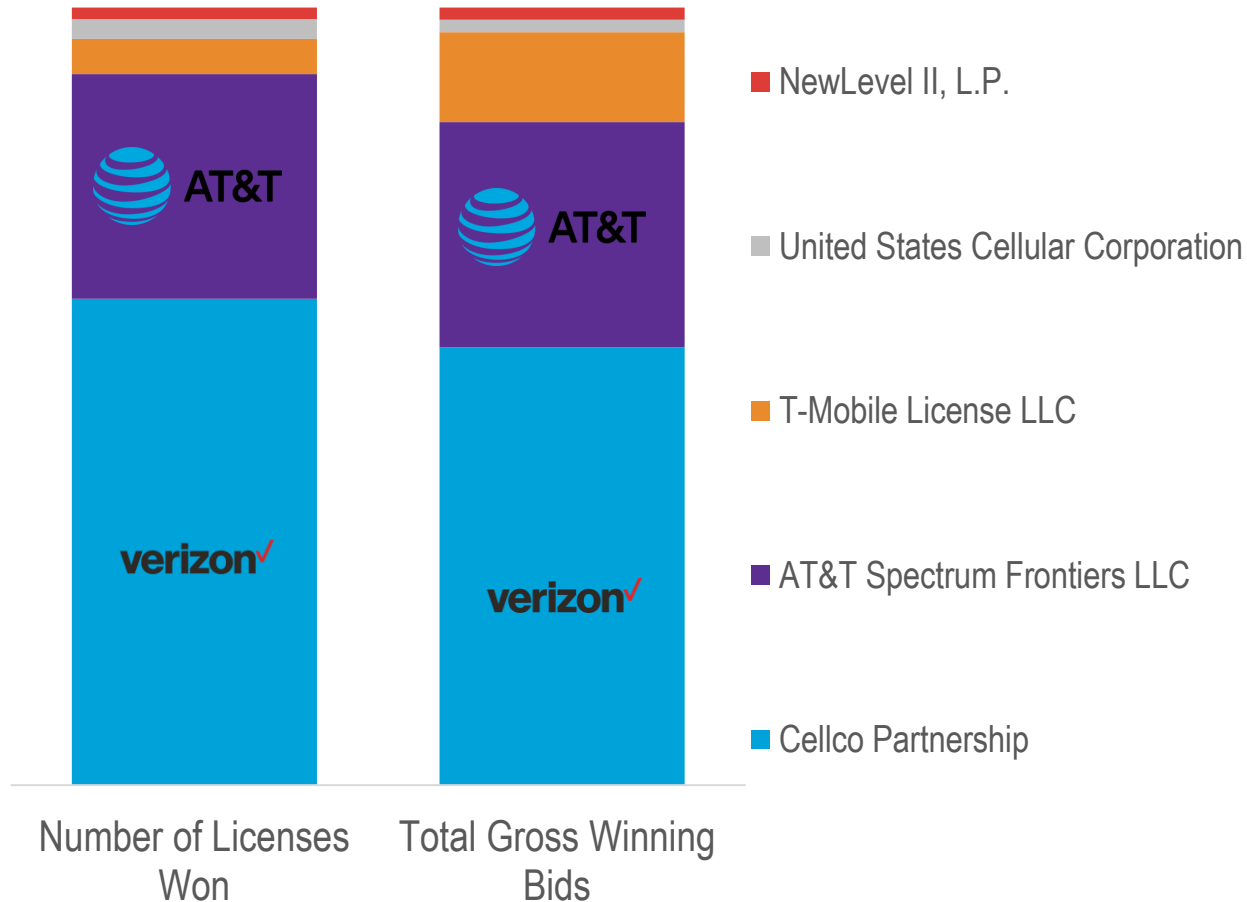


In January 2021, NASCAR created an interactive fan area at the racetracks with the implementation of VR.

In February 2021, NFL's SuperBowl free VR broadcast was covered by CBS Sports, providing a shared viewing experience via Oculus Quest, Oculus Rift, and all SteamVR-compatible (e.g., HTC Vive) headsets via Bigscreen app.



Transition to 5G Americas



”

This transaction brings together two entertainment leaders with complementary content strengths and positions the new company to be one of the leading global direct-to-consumer streaming platforms. The deal also provides AT&T with additional flexibility to invest in what I believe is an equally compelling opportunity, becoming the preeminent U.S. broadband provider.



FCC

Jessica Rosenworcel,
FCC Acting Chairwoman



Digital Transformation in Media: The Stats

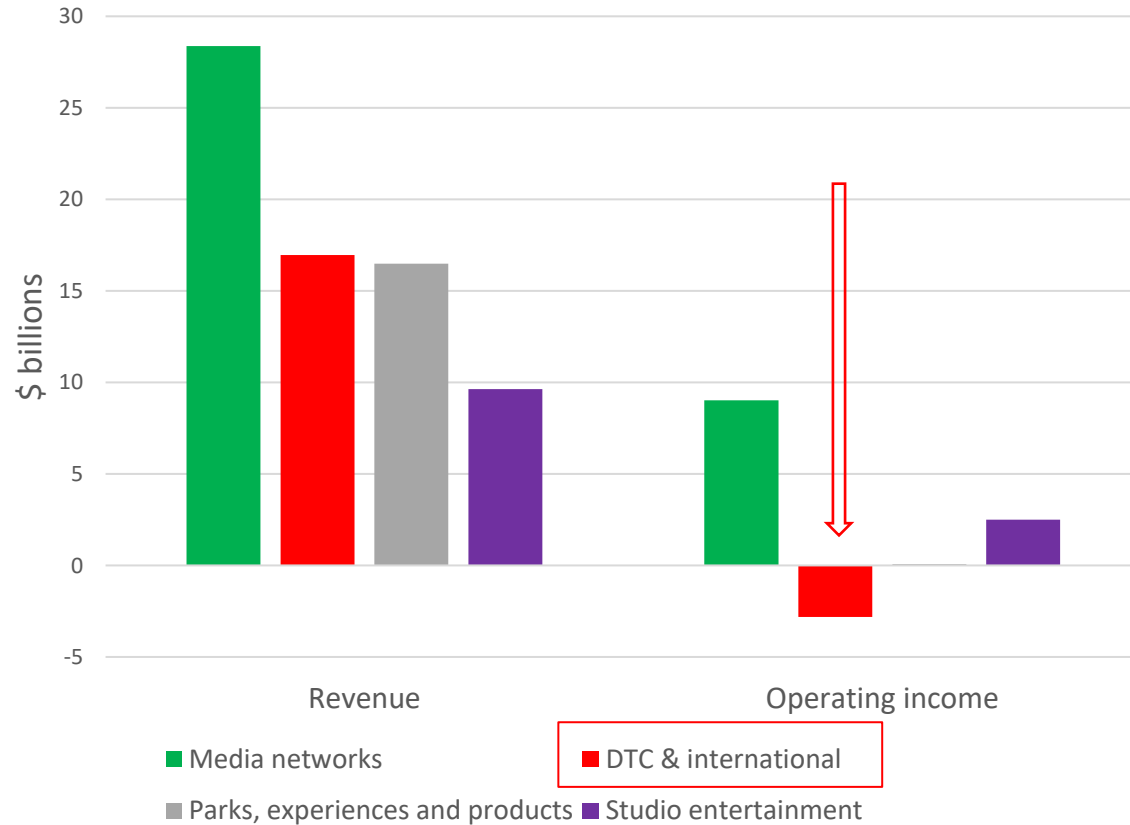
Lorenzo Zanni, Head of Knowledge, IABM



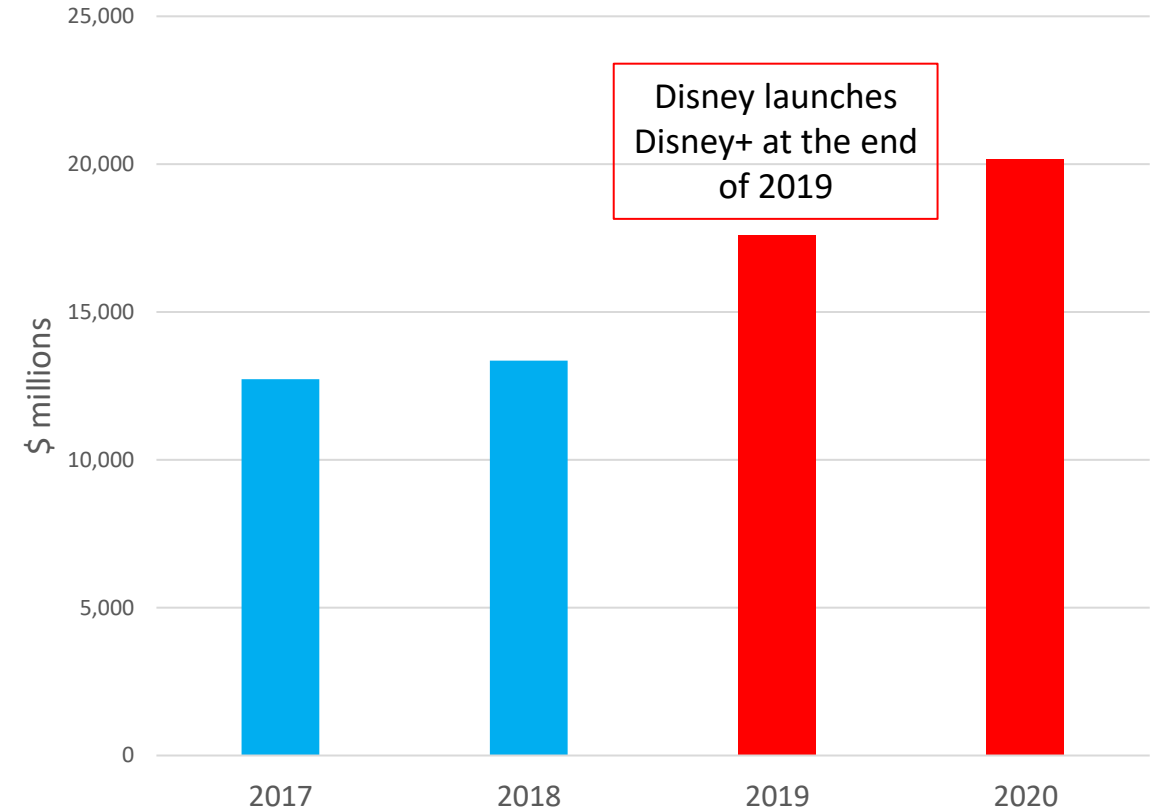
Digital Transformation

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

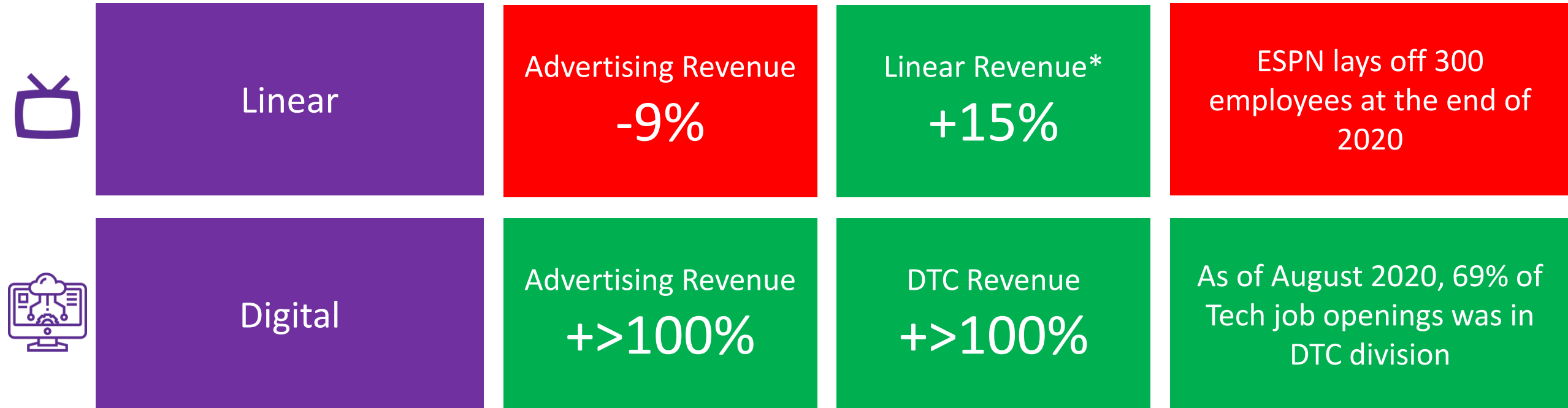


Digital Transformation

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

Digital Transformation

Moving to digital offerings – Media hyper scalers



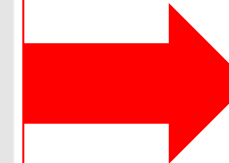
AT&T to merge WarnerMedia with Discovery



- WarnerMedia and Discovery to combine operations to create a global entertainment leader
- David Zaslav to be CEO of new company

Transaction Rationale

- Unlocks significant value for AT&T shareholders
- Positions Discovery shareholders with enhanced long-term growth
- Accelerates HBO Max and discovery+'s global plans for direct-to-consumer
- Creates one of the deepest content libraries in the world
- Unites complementary content and brands across the most popular programming categories
- Expects to generate \$3B+/year in synergies that can be reinvested into content and DTC



Strategic Rationale mostly about content and reach

Amazon → MGM for \$9bn!

4

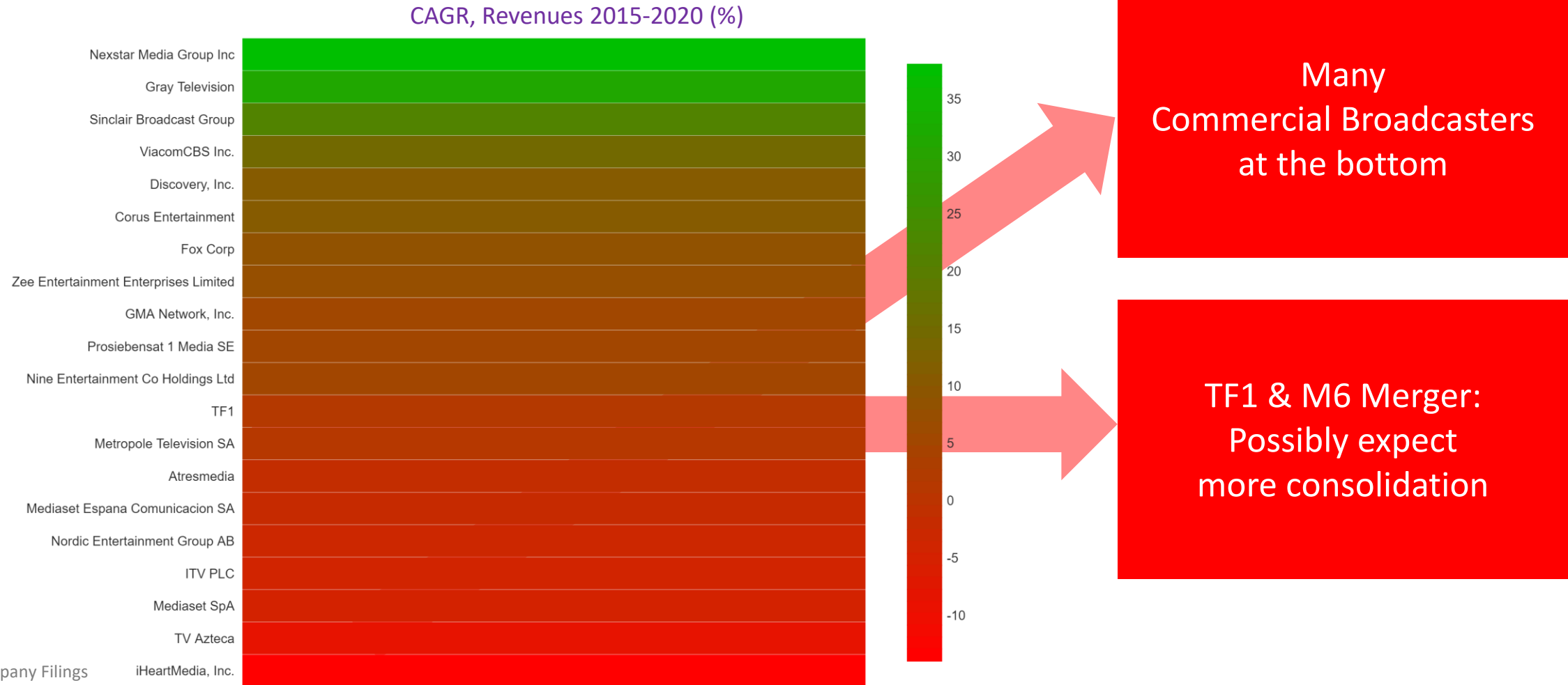


Sources: IABM, Company Filings



Digital Transformation

Moving to digital offerings – Scale pressures



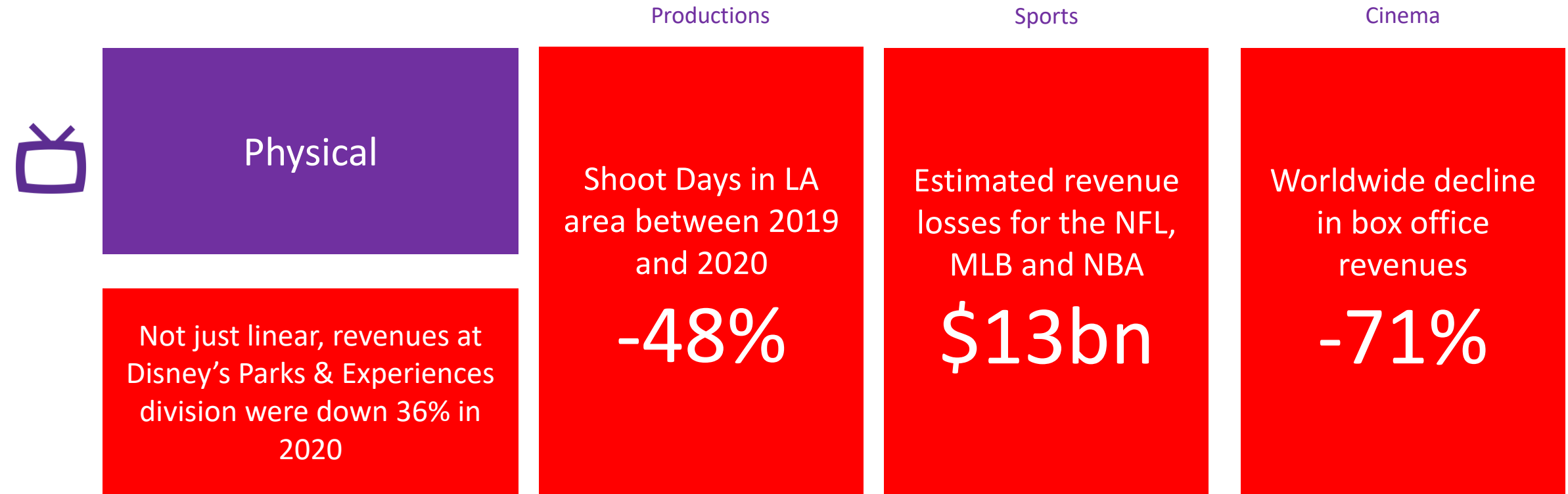
Sources: IABM, Company Filings

iHeartMedia, Inc.



Digital Transformation

Moving to digital offerings – Disruption to physical models adds pressure



Sources: IABM, Bloomberg, Comscore



Digital Transformation

Moving to digital offerings – Transition management

Transition Management



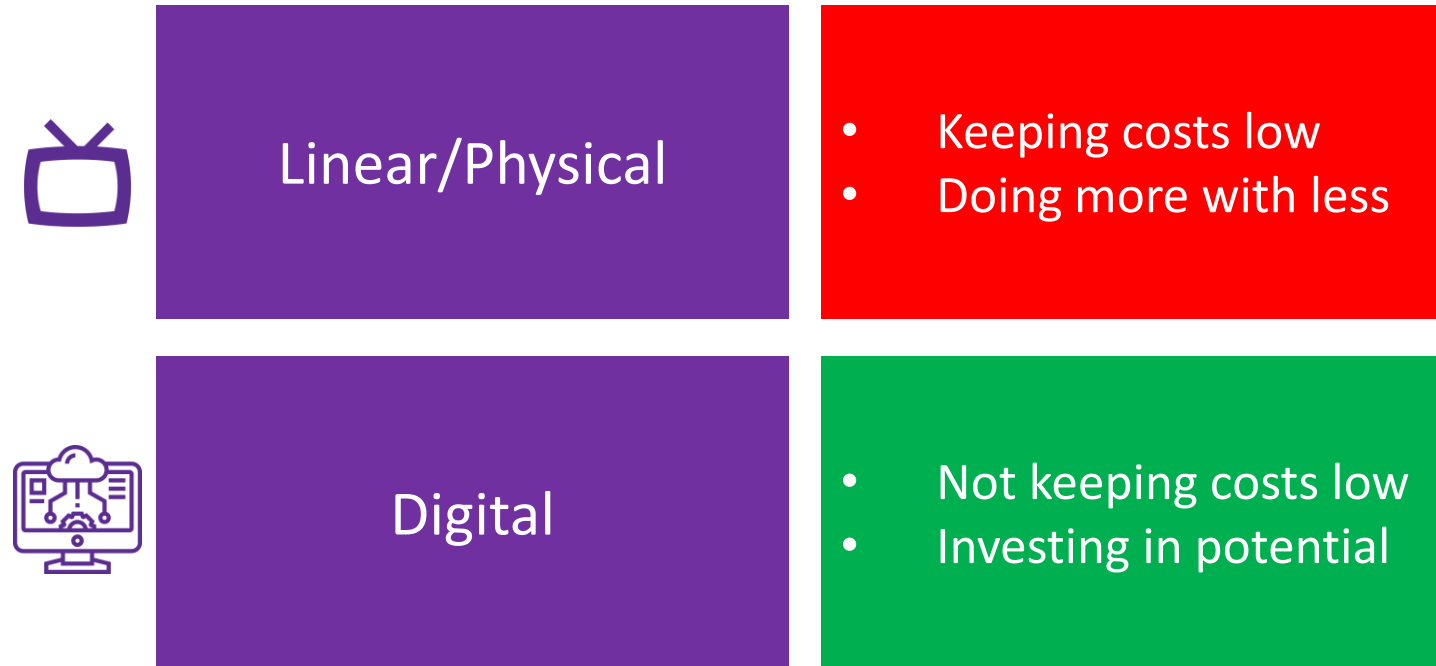
Sources: IABM



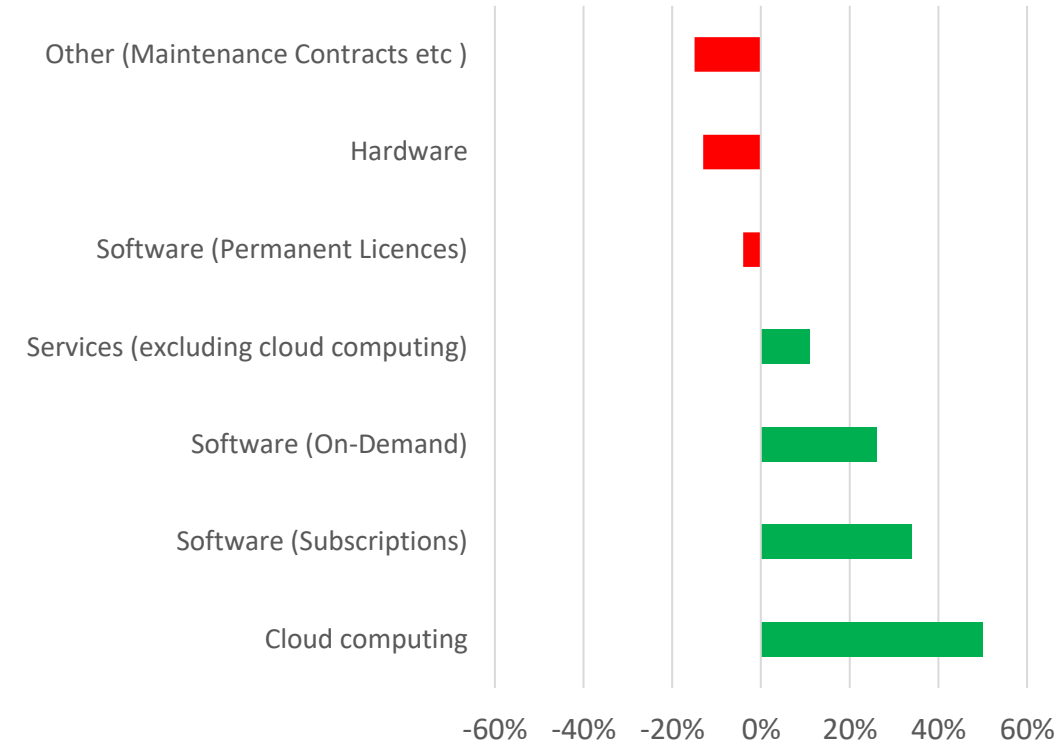
Digital Transformation

How does this translate into tech? Prioritization

Tech Decision-Making



Media tech investment outlook, NET difference in investment



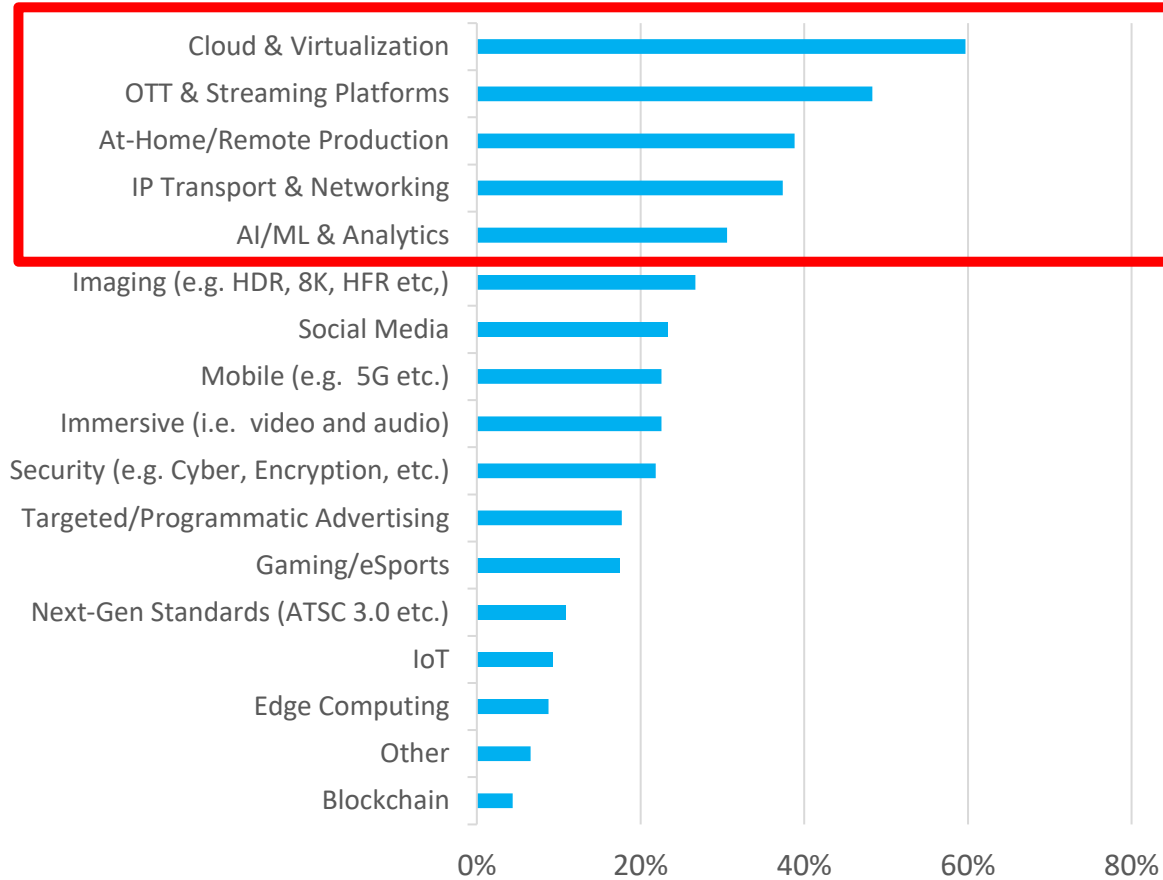
Sources: IABM



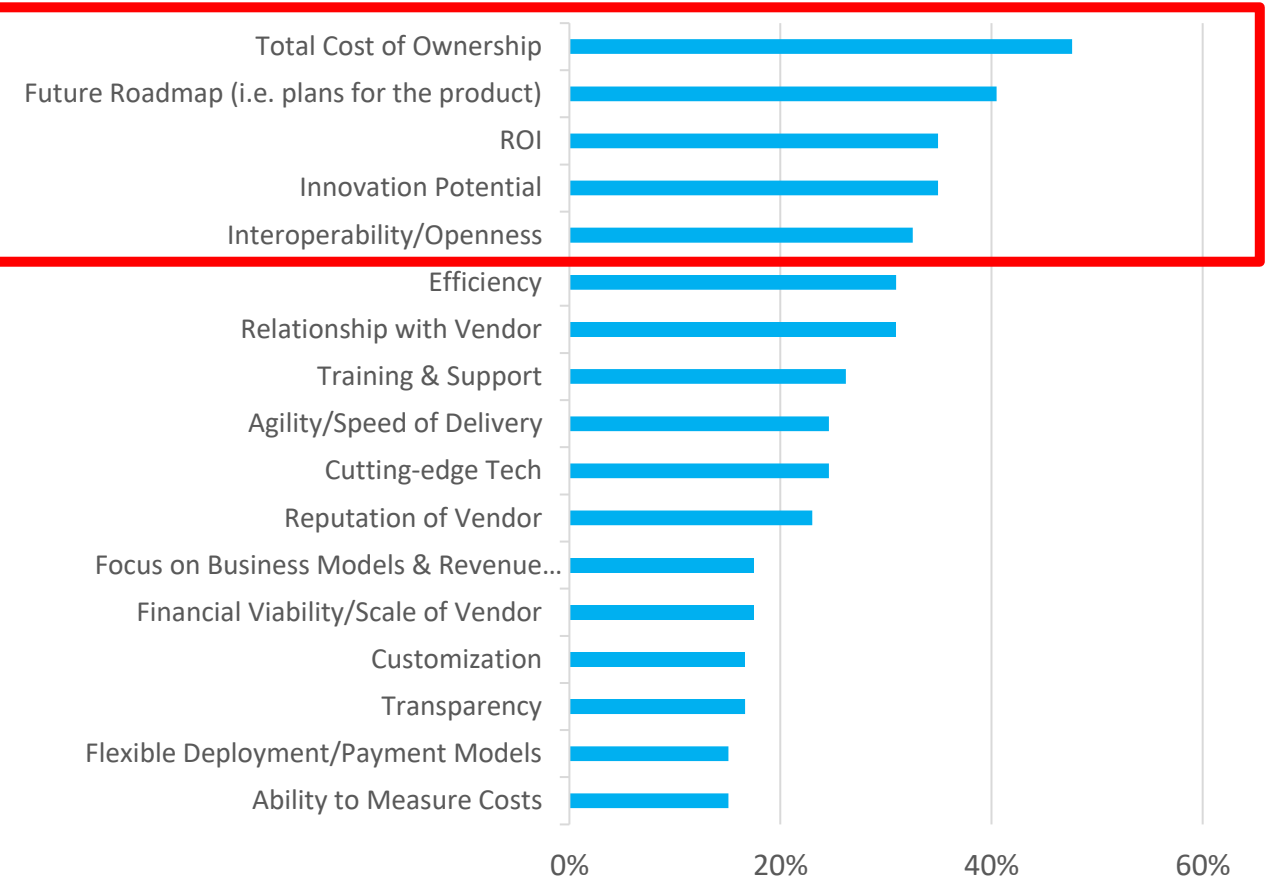
Digital Transformation

Media tech priorities & preferences

Media tech roadmap priorities



Media tech purchasing preferences

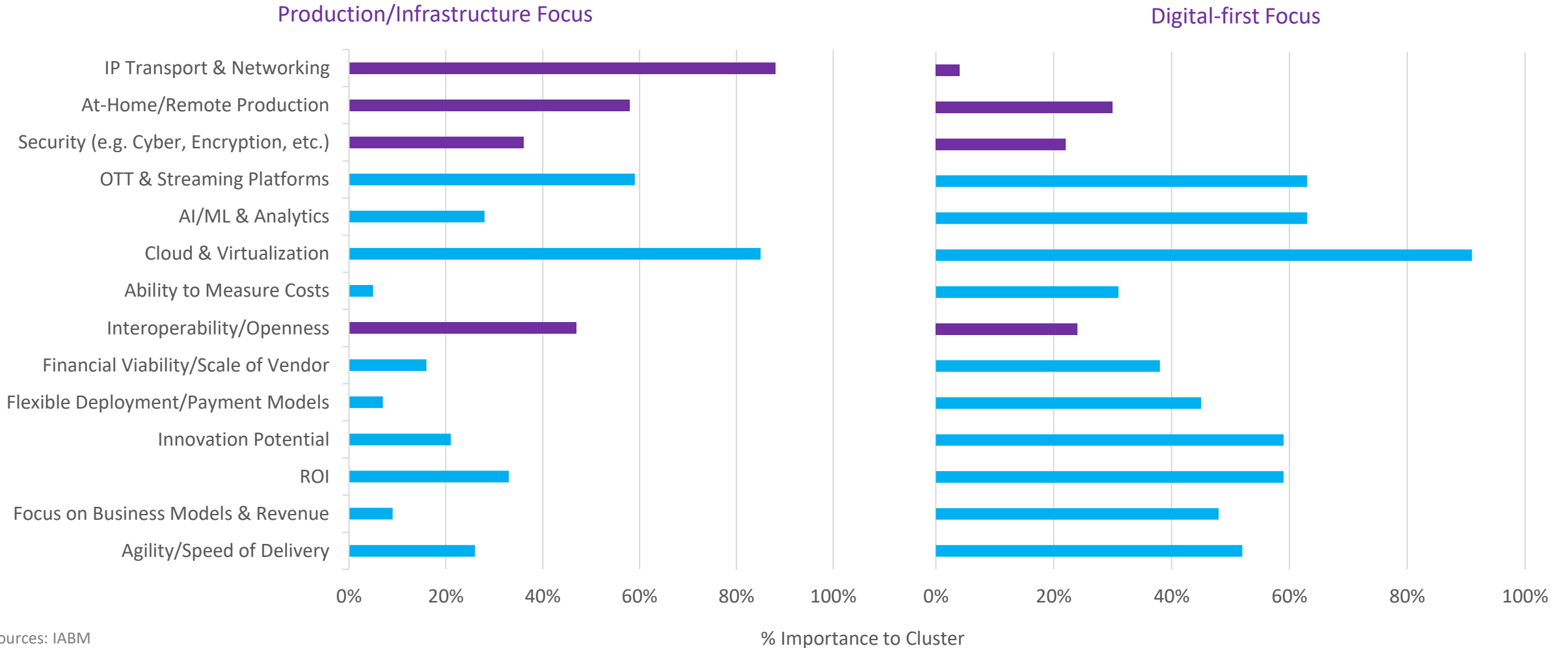


Sources: IABM



Digital Transformation

Delving deeper into the data, interactions between priorities & preferences

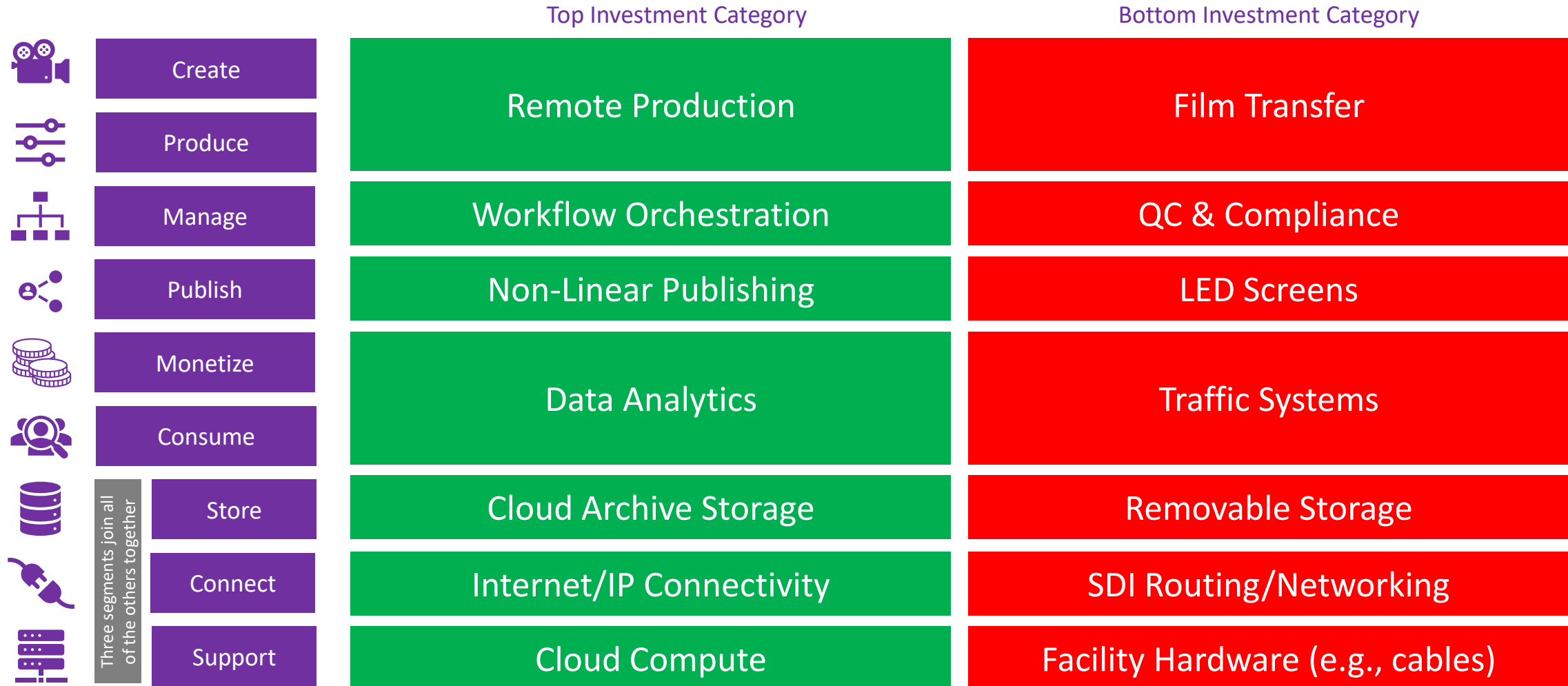


Sources: IABM



Digital Transformation

Media tech investment outlook by segment - COVID-19 effect

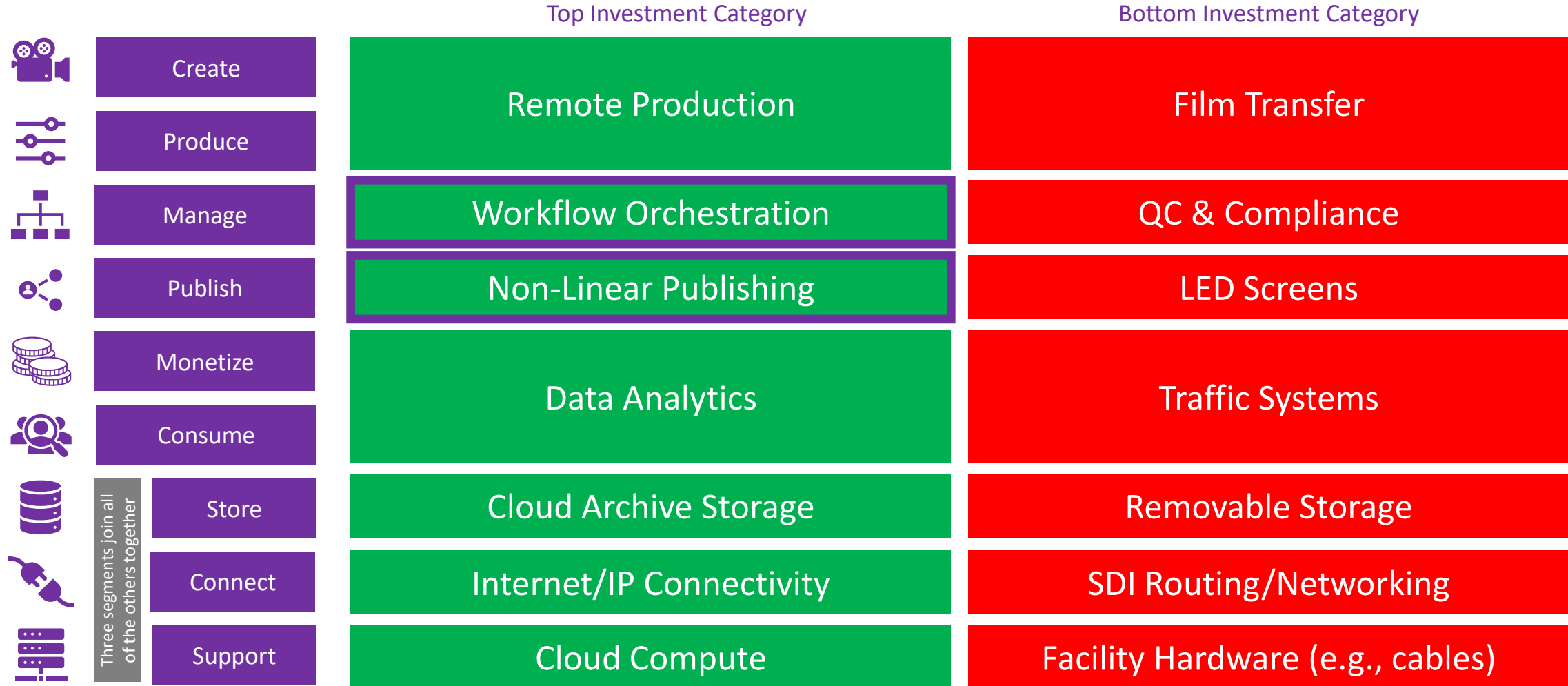


Sources: IABM



Digital Transformation

Manage & Publish examples

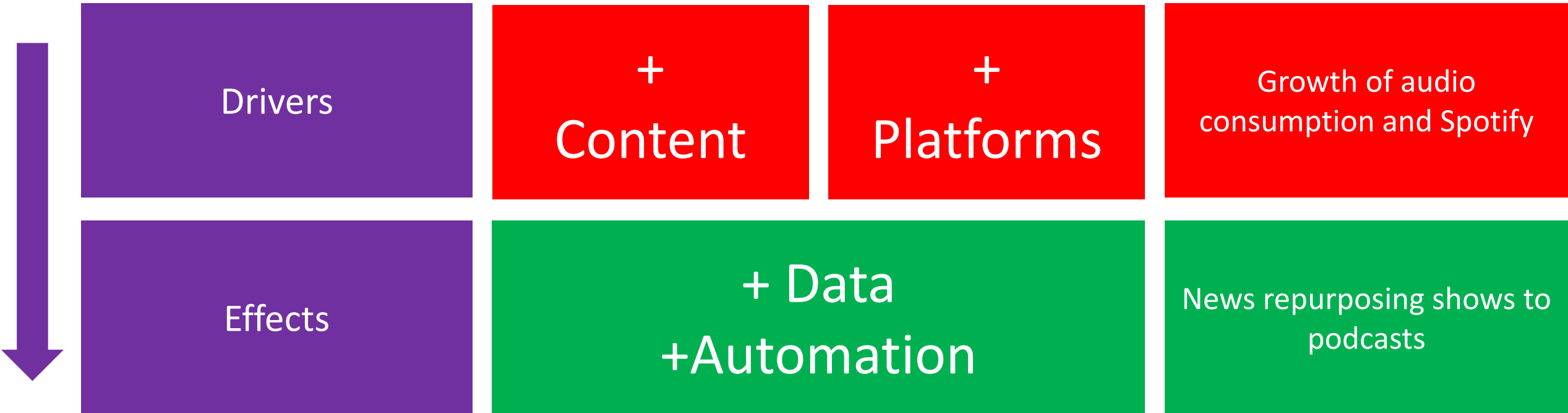


Sources: IABM



Digital Transformation

Digital media supply chains – Drivers/effects



Sources: IABM



Digital Transformation

Digital media supply chains – Major cloud moves

Company	Year	Details
Discovery	2018	“Move to cloud-based playout was part of a broader strategy to virtualize Discovery’s entire content supply and delivery chain... The main driver [for on premises] was access to satellites, but the cloud makes geography irrelevant ”
Fox	2019	Fox’s transition to the cloud included the move of its media supply chain for linear and digital delivery as well as the increasing reliance on analytics services
ViacomCBS	2020	ViacomCBS migrated its entire broadcast infrastructure to the cloud , including 425 linear TV channels and 40 global data and media centers
Globo	2021	Globo’s transition to the cloud included the migration of 100% of its data centers to the cloud as well as the increasing use of machine learning services

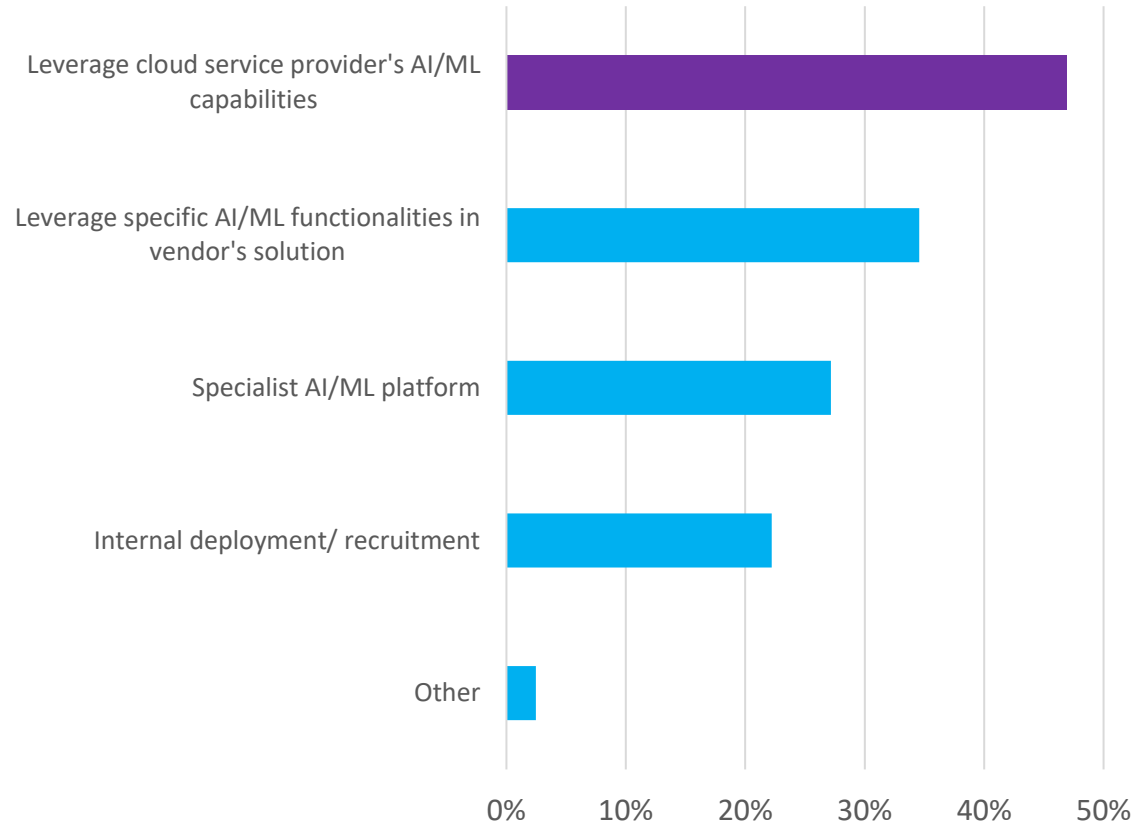
Sources: IABM, AWS, Google Cloud



Digital Transformation

Cloud/Digital moves – Some drivers & implications

Preferred deployment models for AI/ML



Sources: IABM

Insourcing investment

Media companies saying that investment in internal SW Development is growing

39%

Insourcing drivers

Enabling customization

Enabling integration

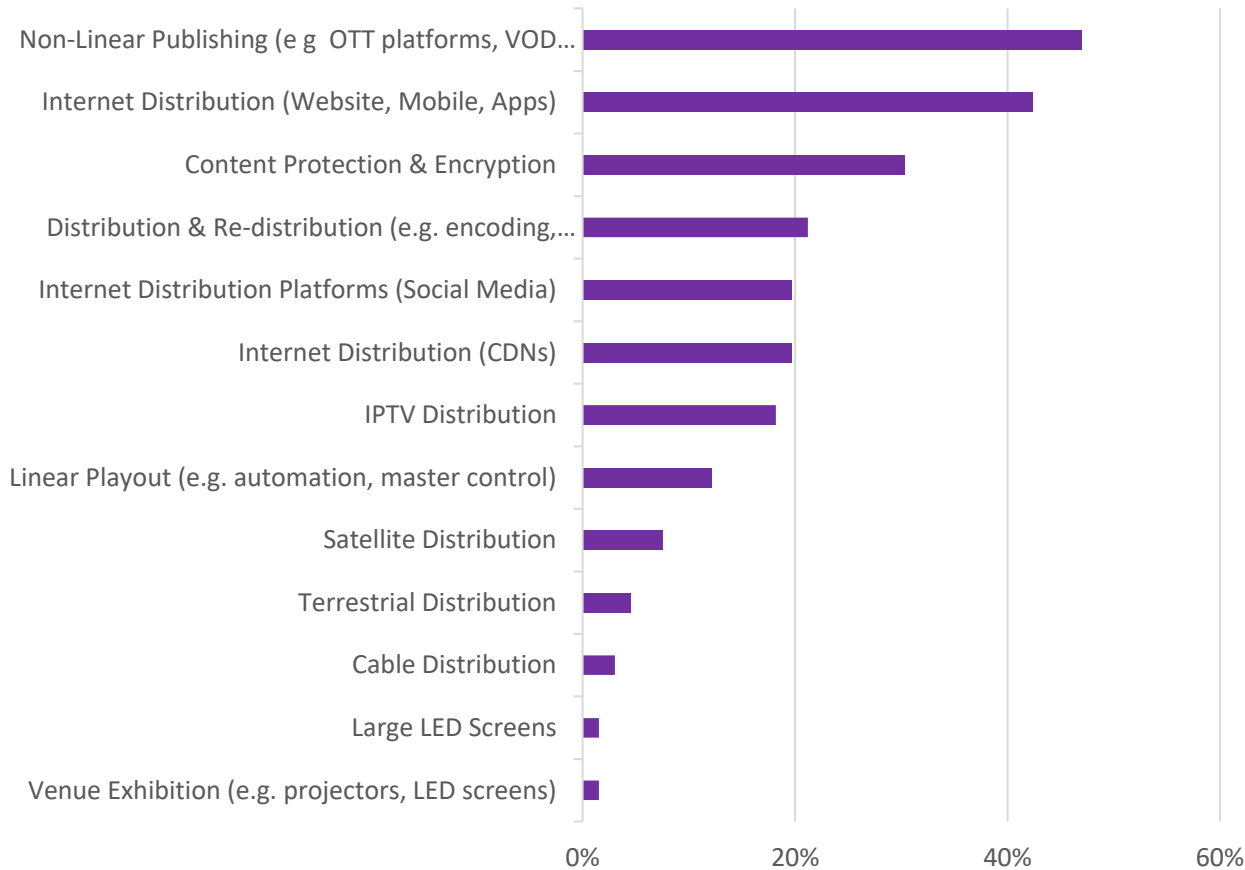
Control over tech roadmaps

Digital Transformation

Publish drivers



Publish investment outlook



Sources: IABM

Harmonic Q4 Earnings Call

We've seen kind of a **stagnation of investment in traditional broadcast infrastructure**, as many companies have tried to figure out where to go, and we've seen **growth around streaming**, and in particular, the **SaaS component of streaming**.

...

But keep in mind, **a lot of what we're talking about is simply about timing**. I think if you take a step back, **there are billions of dollars of advertising and subscription revenue, riding on this infrastructure**. It's not going anywhere. It's going to be around

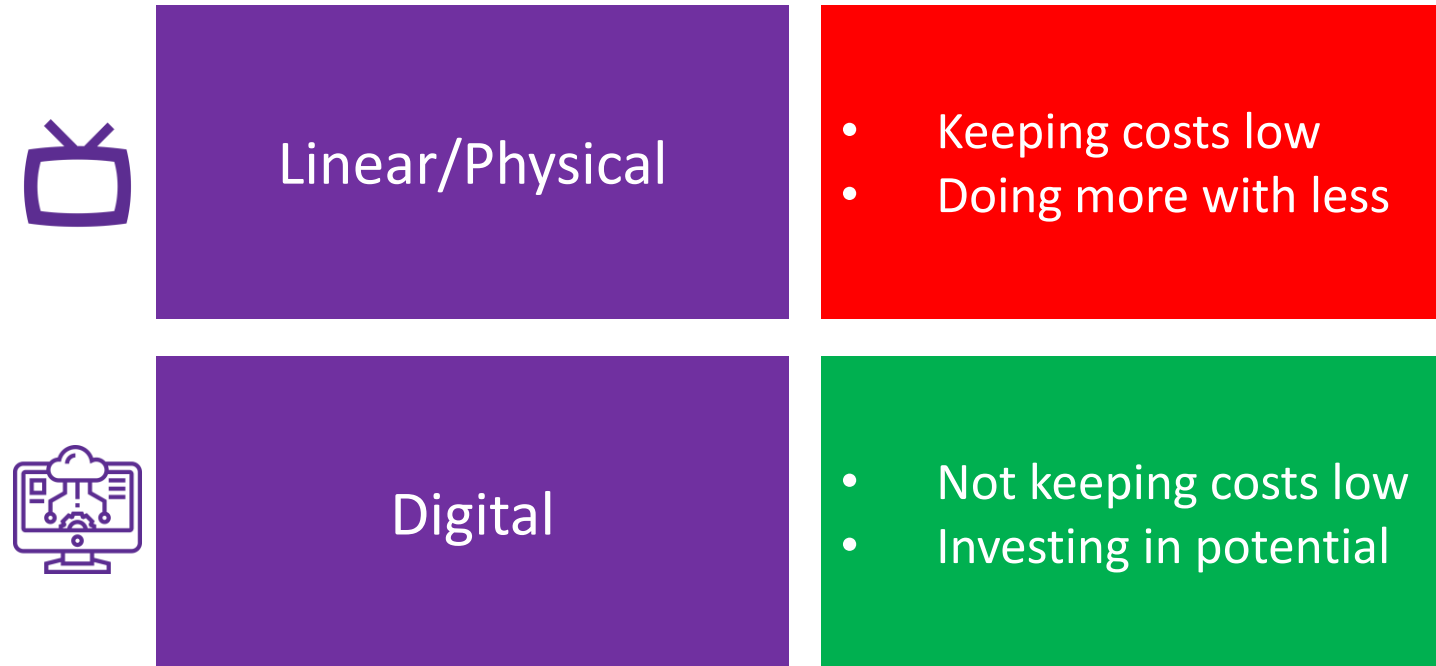
Patrick Harshman
CEO
Harmonic
(February 2021)



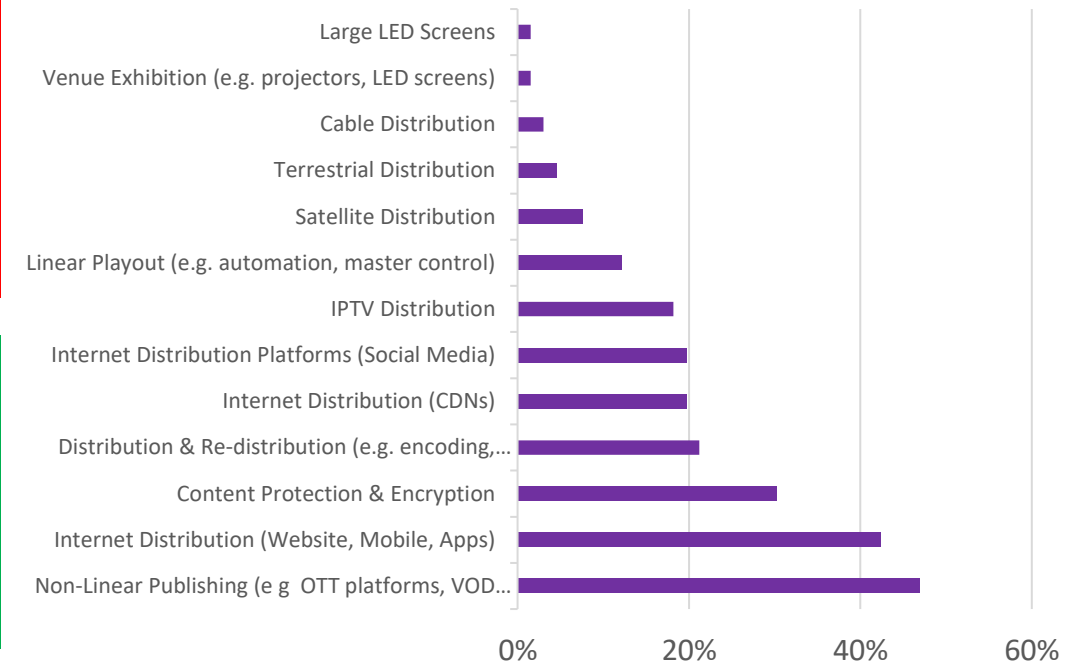
Digital Transformation

Publish drivers – back to prioritization

Tech Decision-Making



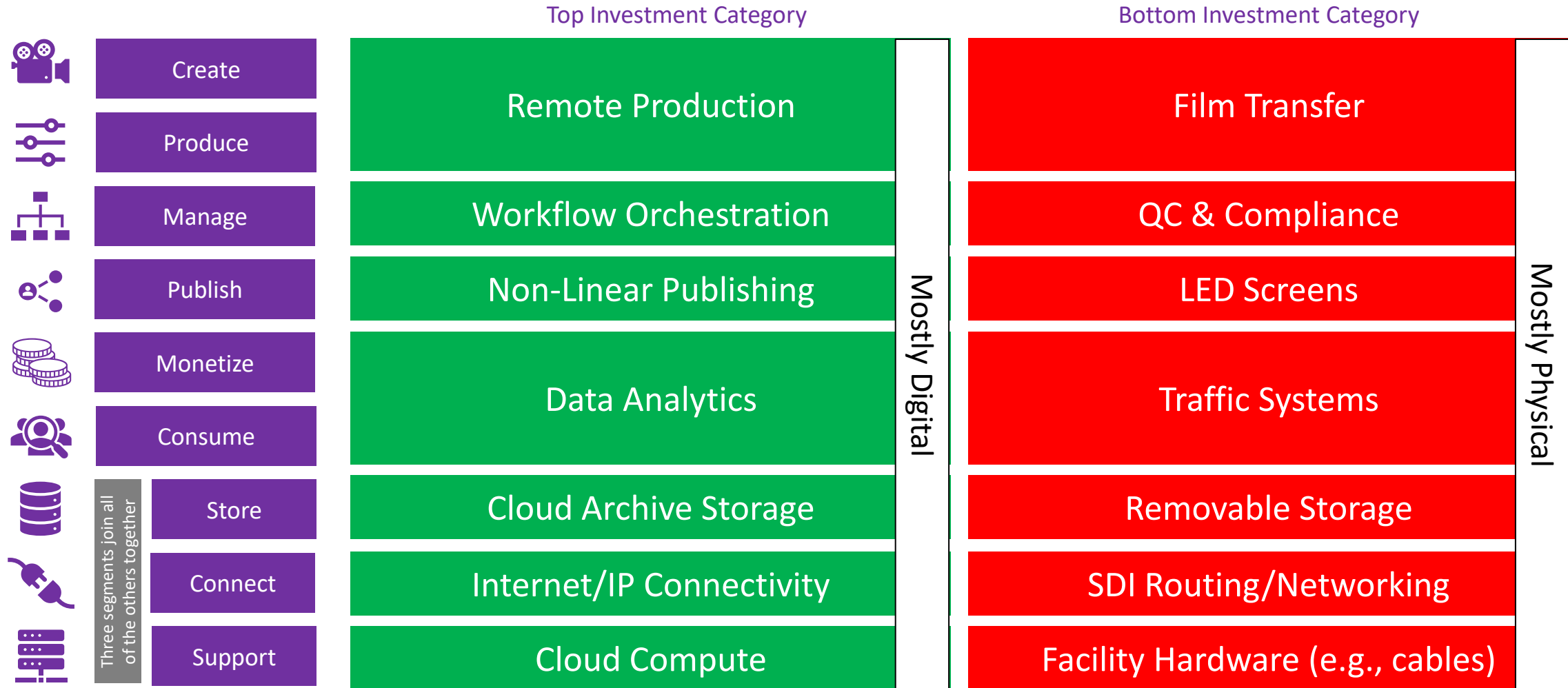
Publish investment outlook



Sources: IABM

Digital Transformation

Media tech investment outlook by segment – Digital & Physical investment



Sources: IABM



Digital Transformation

Is this the end of physical? Not really

ViacomCBS Q4 2020 Earnings Call

*“Some people will tell you that a **company like ours has to choose**, that we're **either all in on linear or all in on streaming**. We think **that is a false choice**. We are not about only linear or only streaming. **We're about both linear and streaming.**”*

Shari E. Redstone
Non-Executive Chair
ViacomCBS
(February 2021)

The future is Hybrid

Hybrid media offerings

Hybrid business models

Hybrid workplaces

What about Tech?

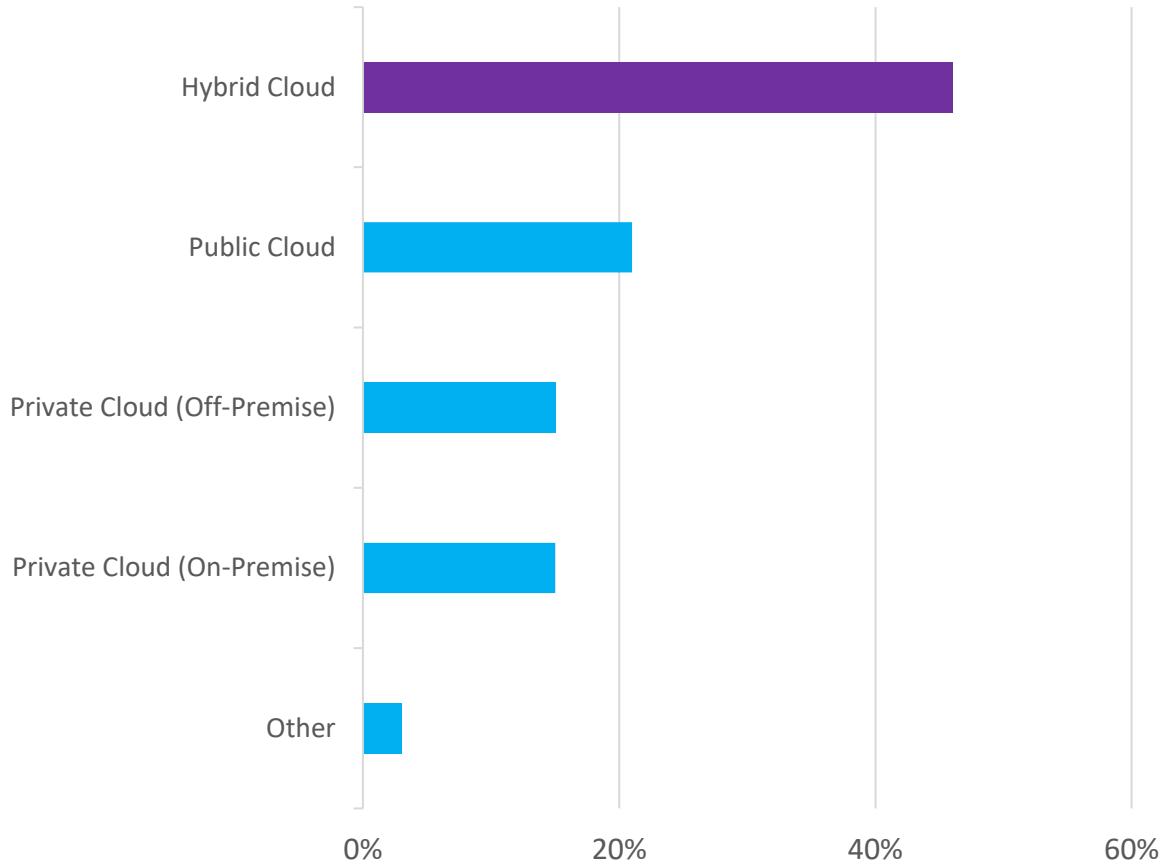
Sources: IABM



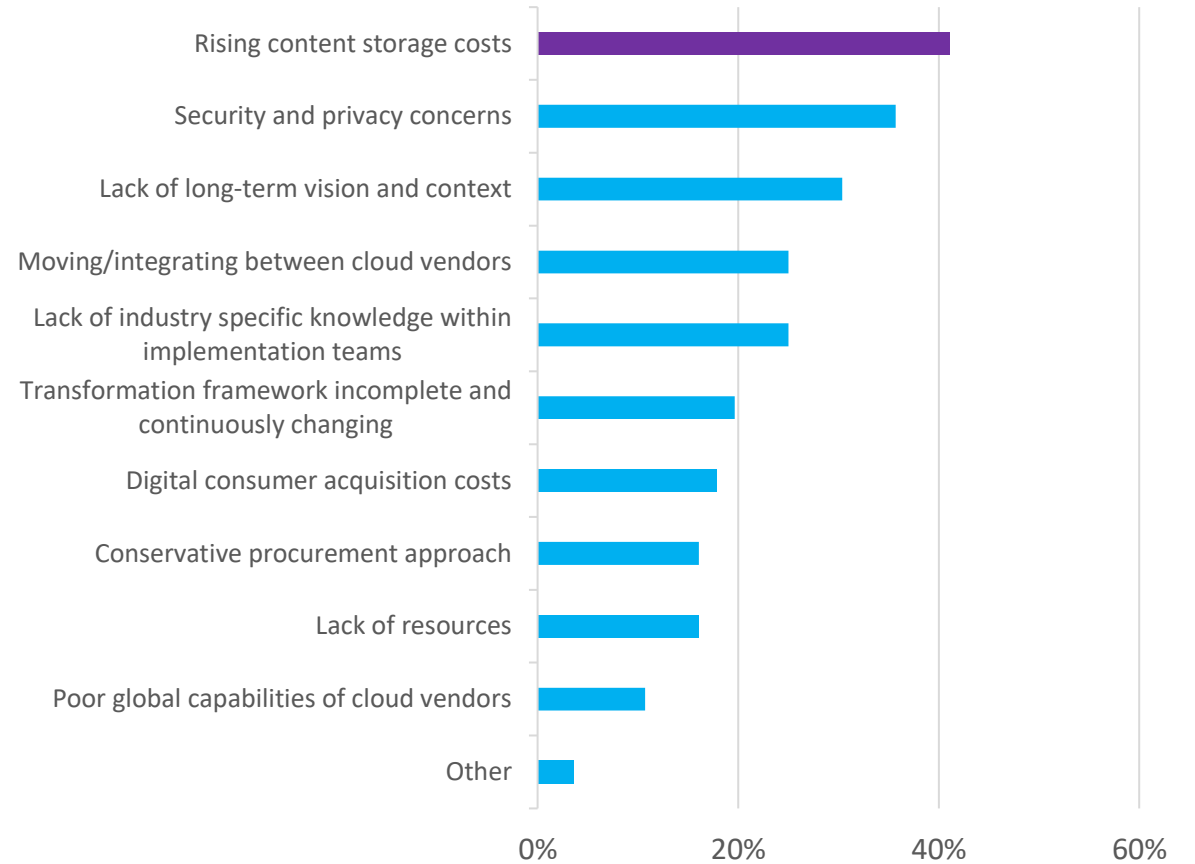
Digital Transformation

Hybrid too, but depends on context/use case

Preferred deployment models for Cloud



Cloud adoption barriers



Sources: IABM



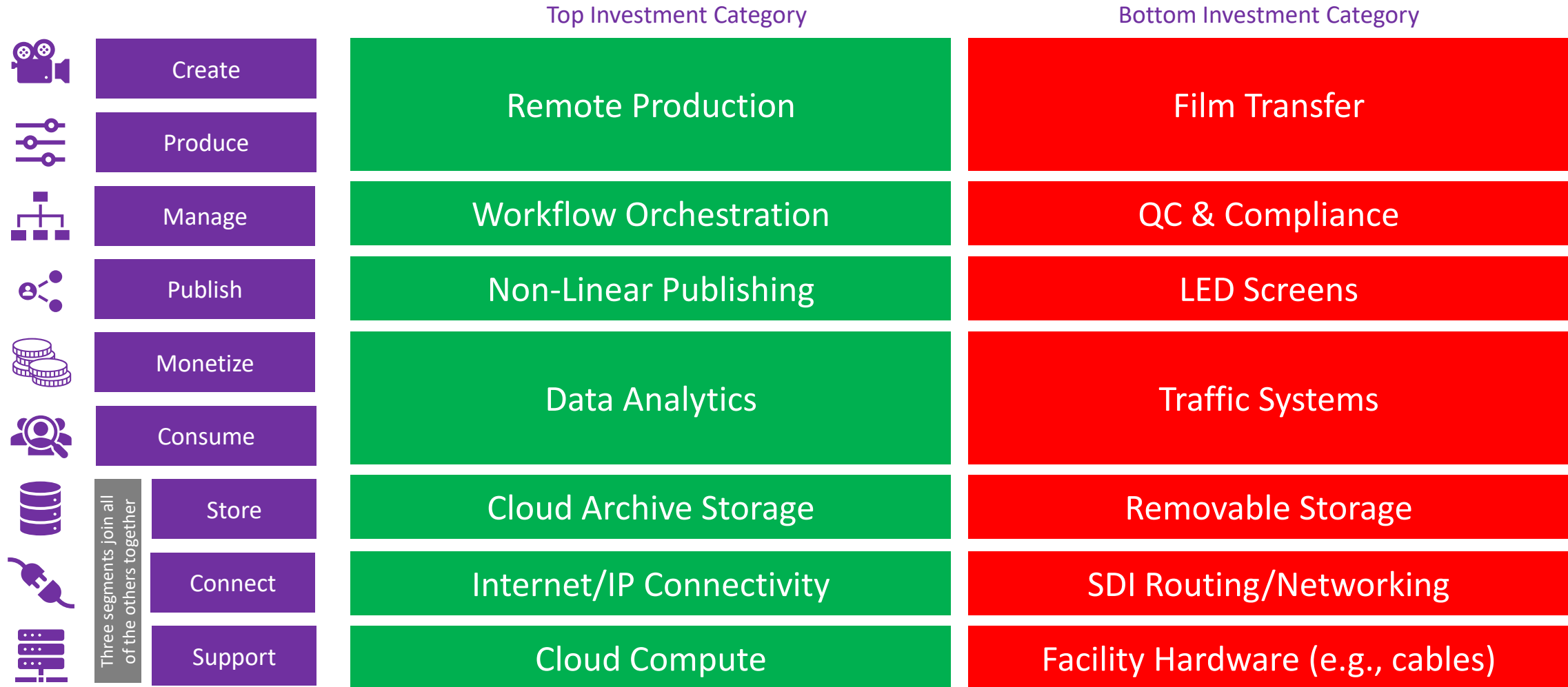
Decentralized Production Models: Effects on Media Tech Investment

Lorenzo Zanni, Head of Knowledge, IABM



Media Tech Investment

Media tech investment outlook by segment

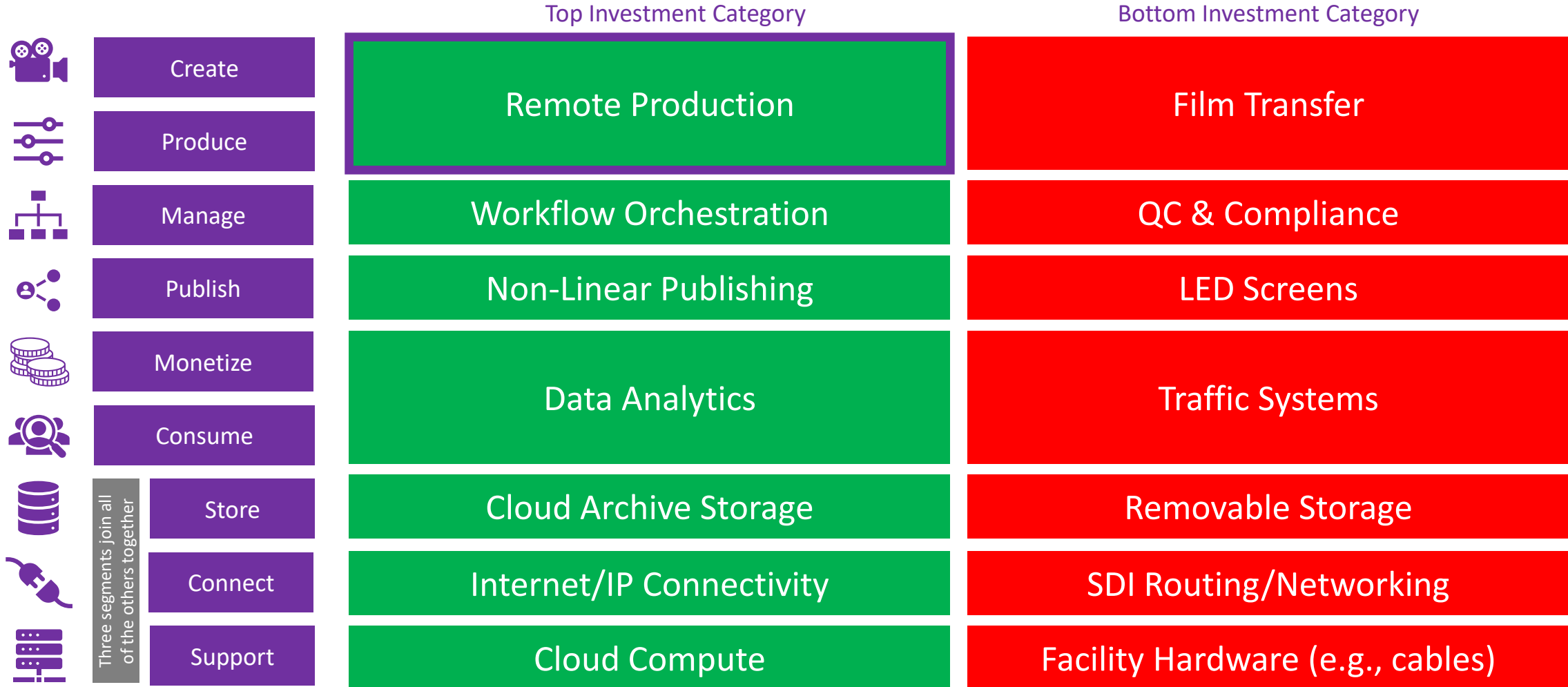


Sources: IABM



Remote Production Investment

Remote production focus



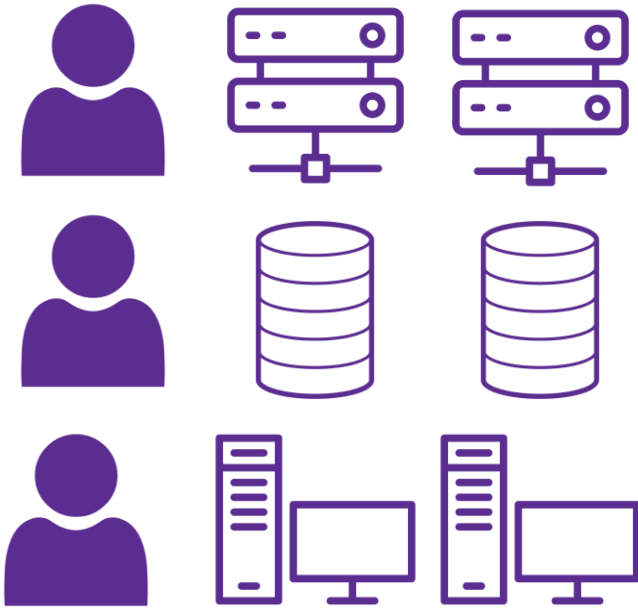
Sources: IABM

Remote Production Investment

COVID-19 effect – A simplified view



Pre-COVID Plans (Centralized Model)



ESPN

50%

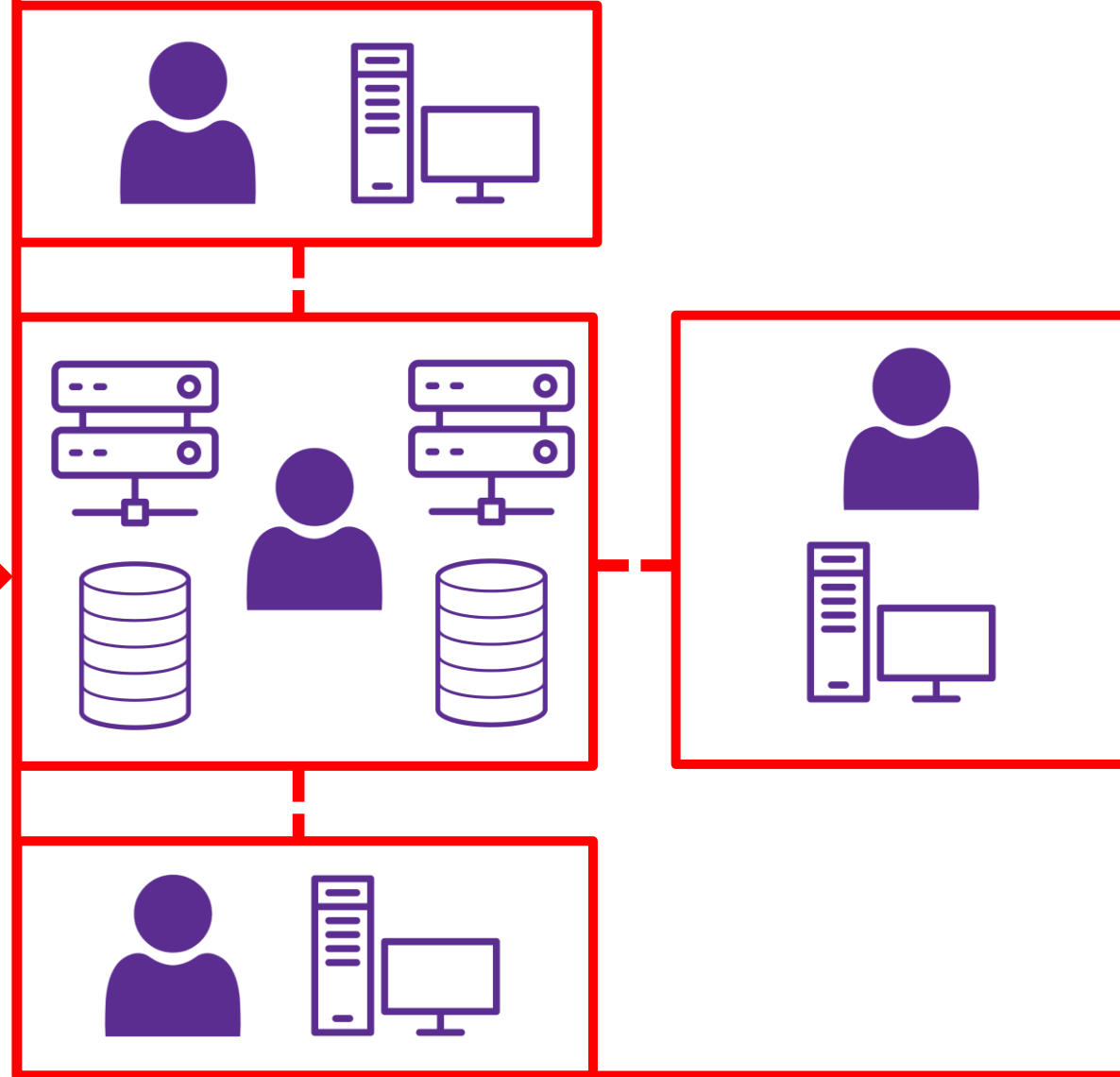
Remote Production Coverage
for Basketball Planned for
2021

Move to Remote Working

sky sports **EURO SPORT**

Increasing
remote production
investment

Post-COVID Reality (Decentralized Model)



Sources: IABM

Remote Production Investment

COVID-19 effect – Cloud investment



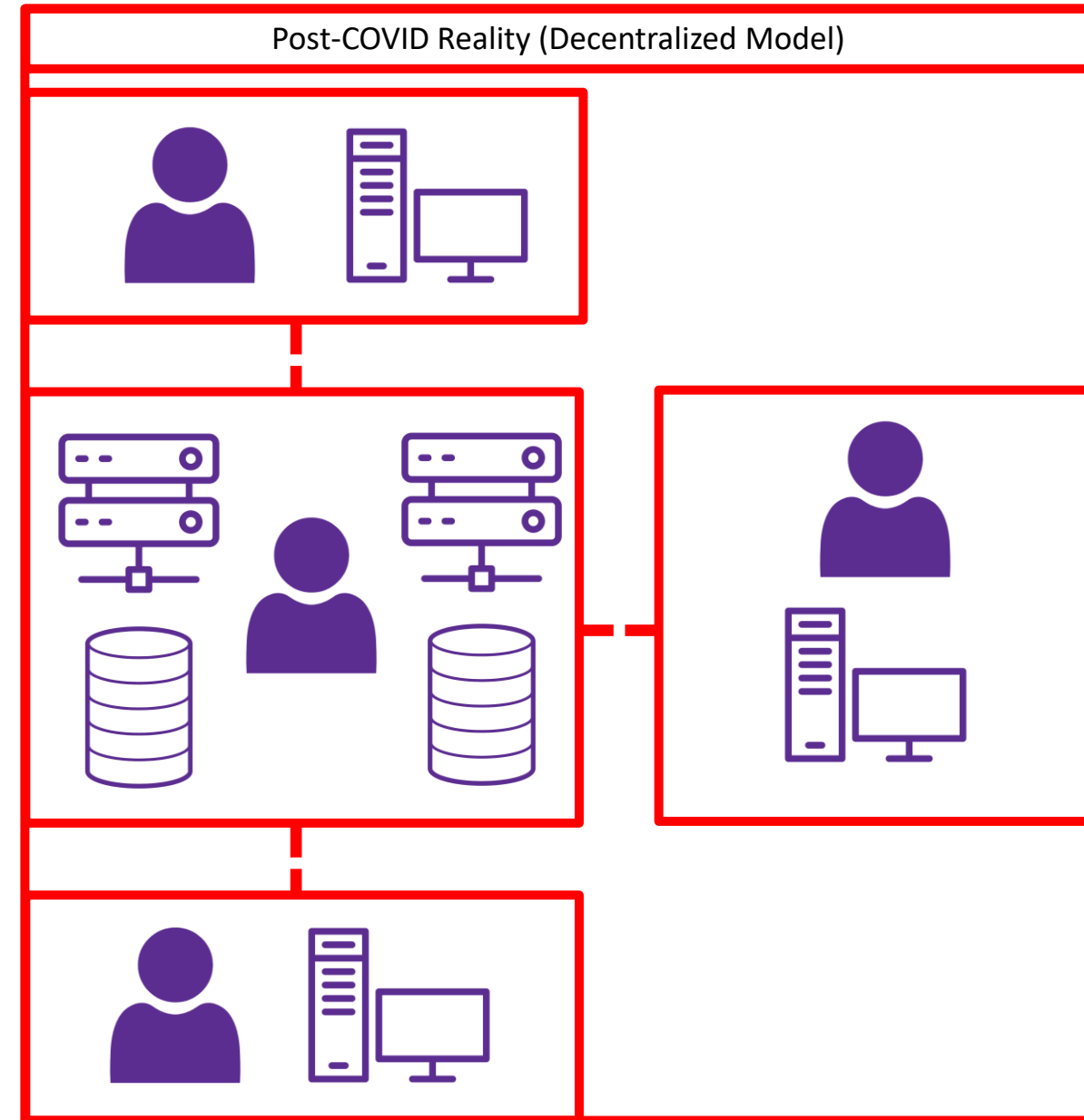
Blizzard moves to cloud-based remote production

“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

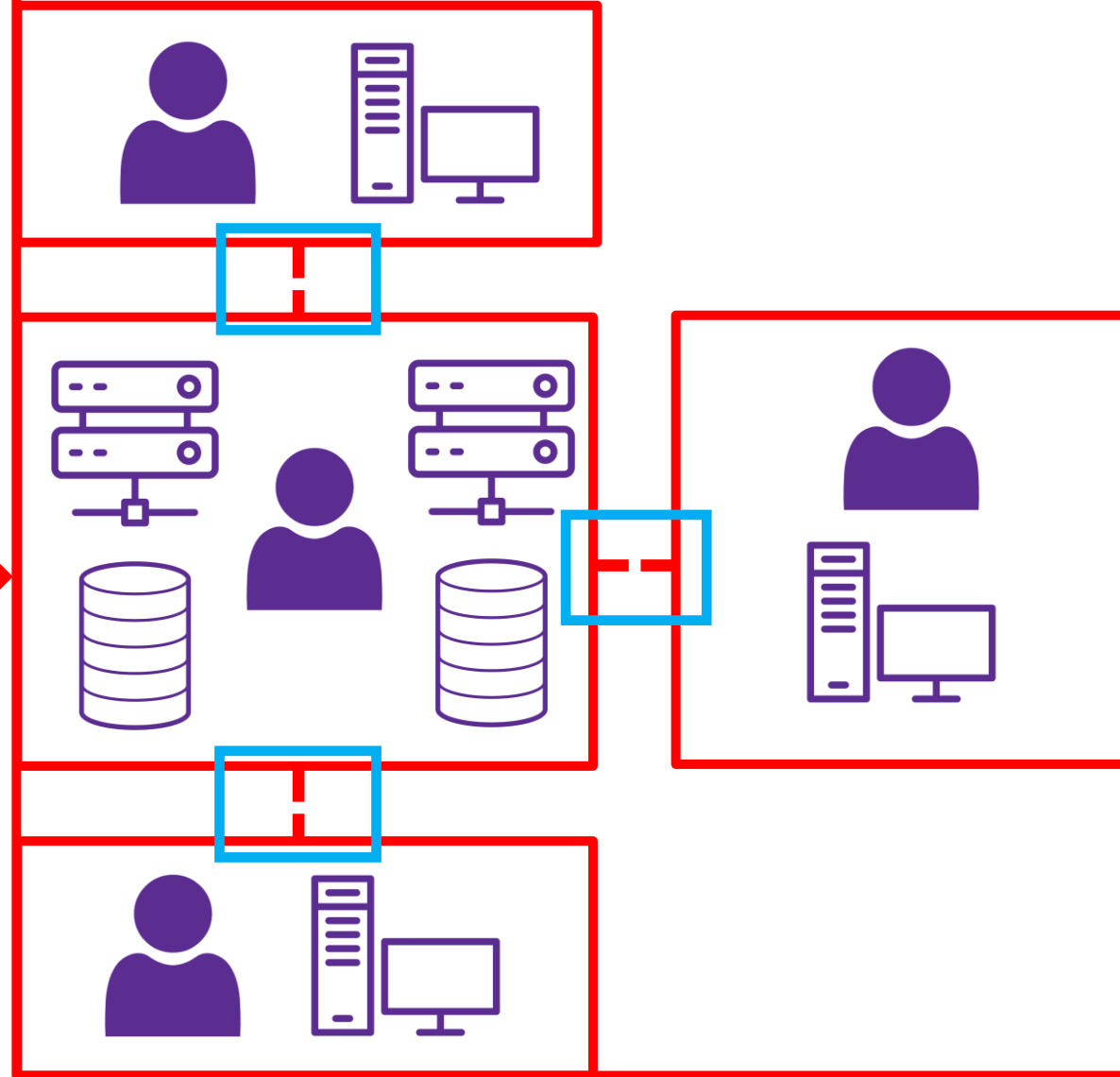


Pre-COVID Plans (Centralized Model)



Move to Remote Working

Post-COVID Reality (Decentralized Model)

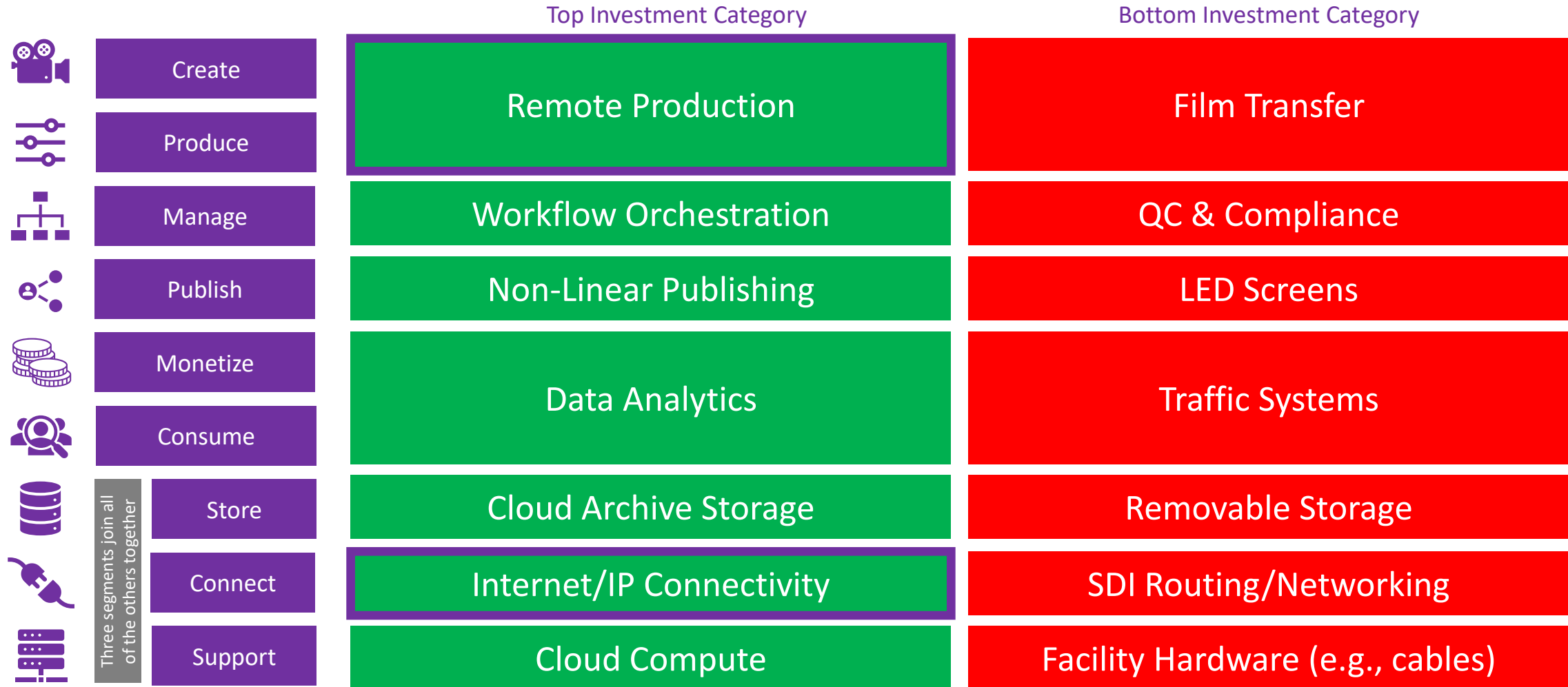


Sources: IABM



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

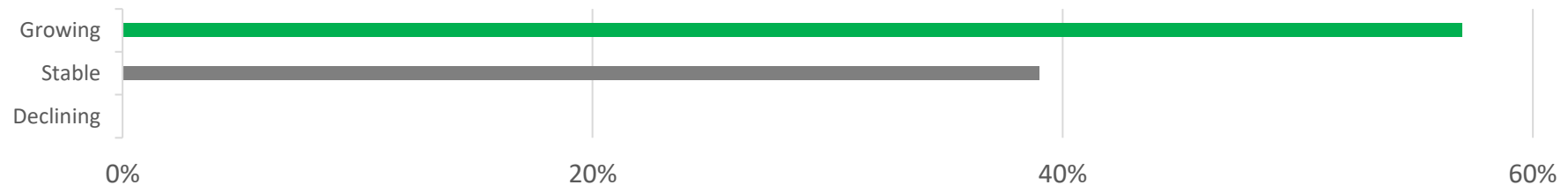


Acquires VISTA Worldlink in March 2021 to “become a leader in Centralized (Remote) Production”

Mar. 2021

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

COVID-19 effect – A simplified view

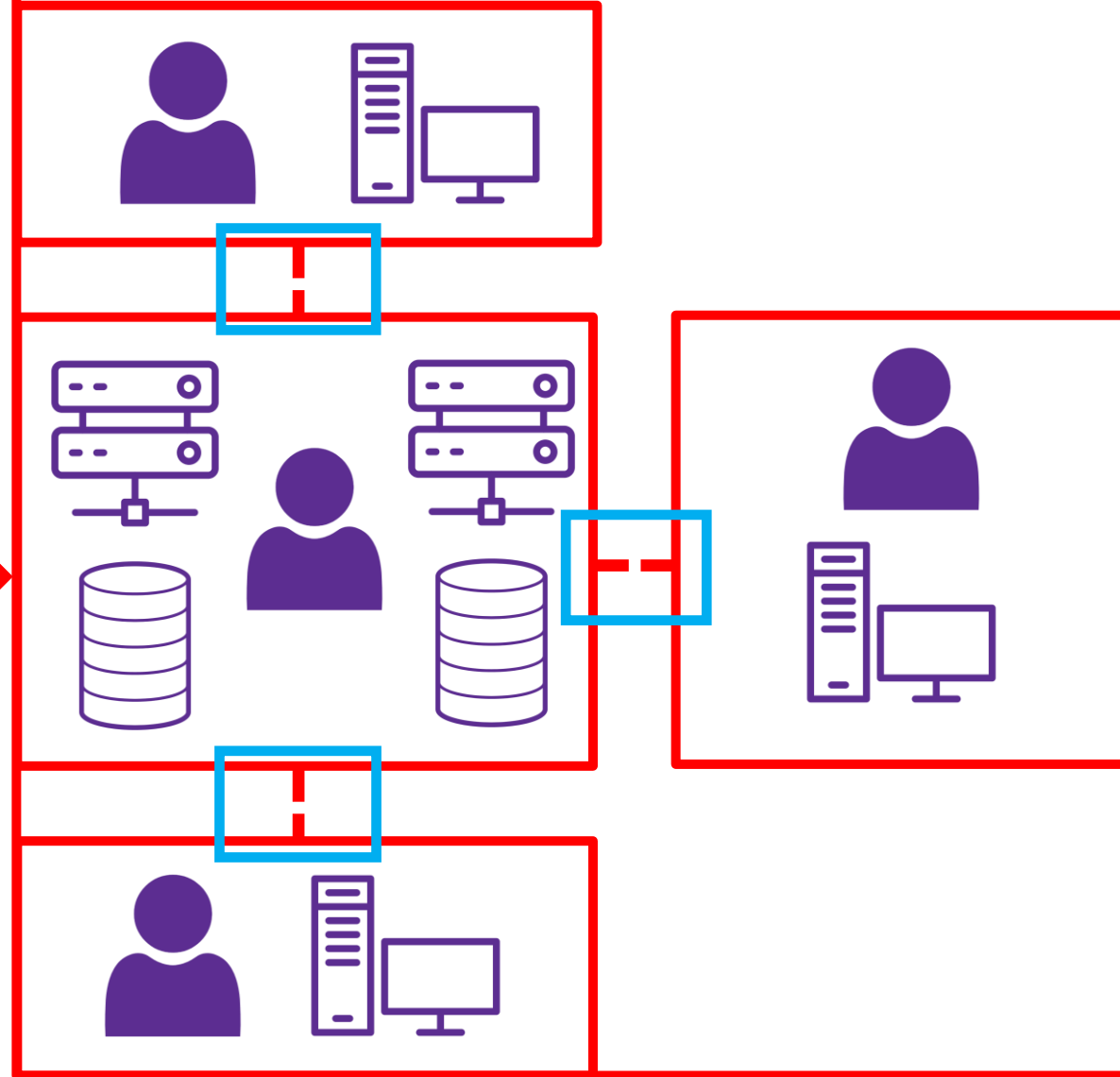


Pre-COVID Plans (Centralized Model)



Move to Remote Working

Post-COVID Reality (Decentralized Model)



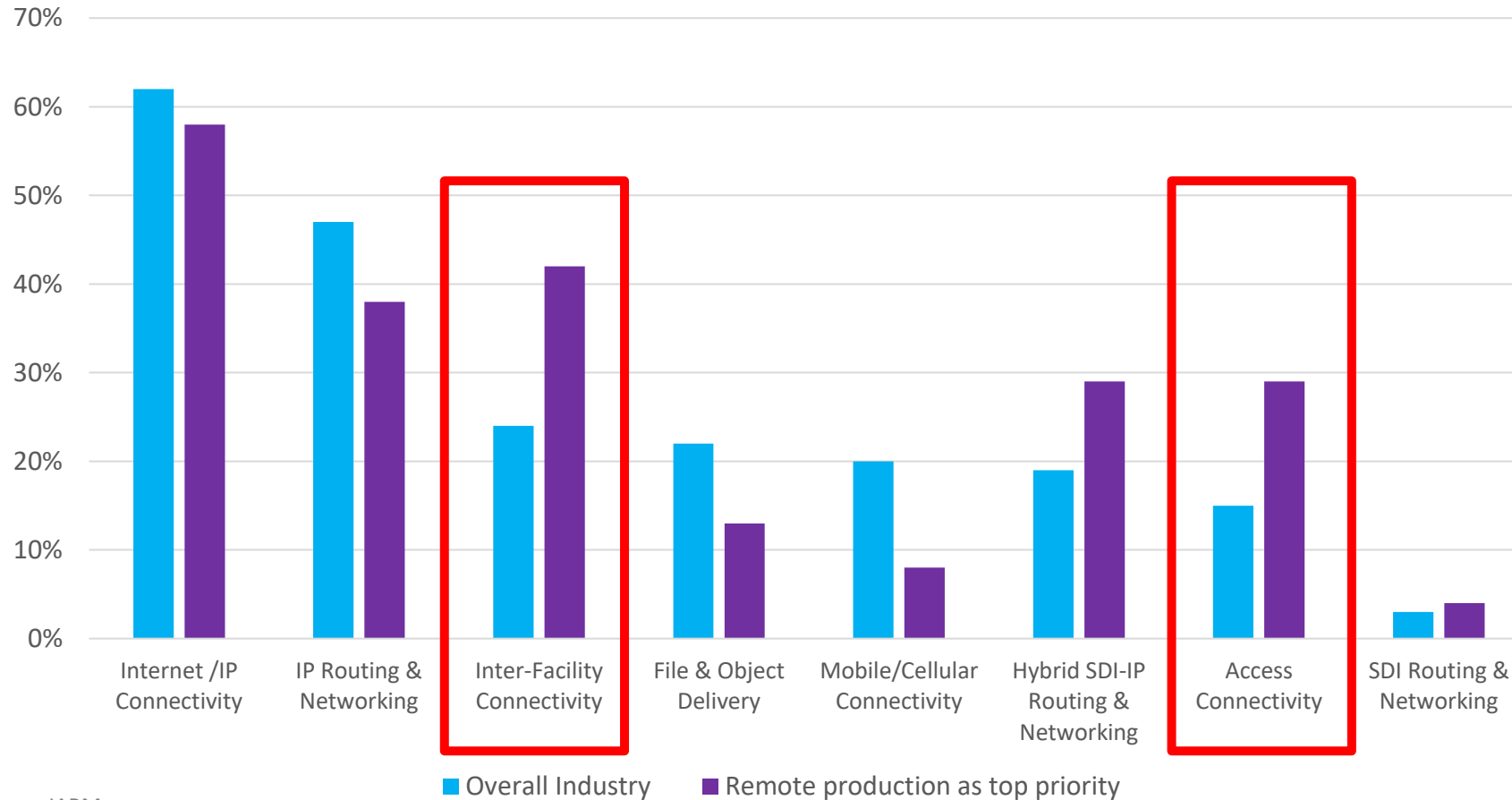
Sources: IABM



Remote Production Investment

Connectivity investment

Top Investment Areas in Connect



Sources: IABM

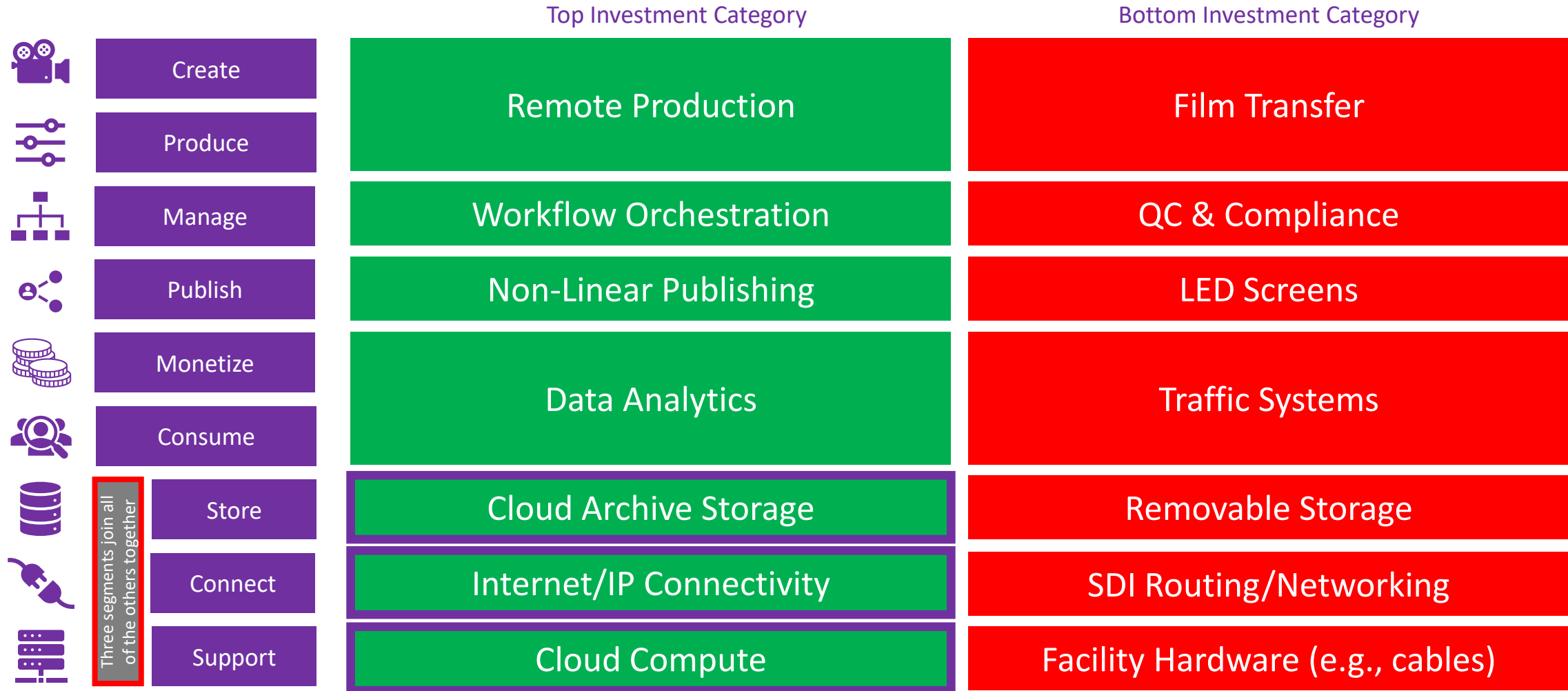
+ Inter-Facility
Connectivity
(contributor feeds,
contribution over internet
etc.)

+ Access
Connectivity
(bonded cellular,
particularly in
news/sports)



Remote Production Investment

Media tech investment outlook by segment – focus on infrastructure



Three segments join all of the others together

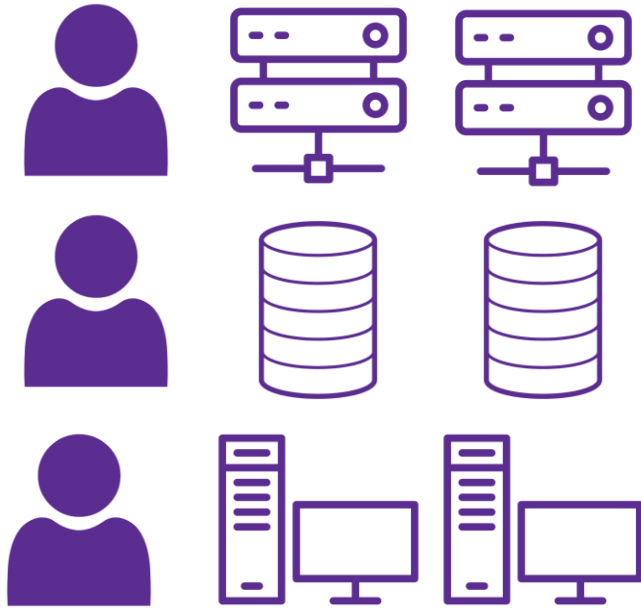
Sources: IABM

Remote Production Investment

COVID-19 effect – A simplified view



Pre-COVID Plans (Centralized Model)

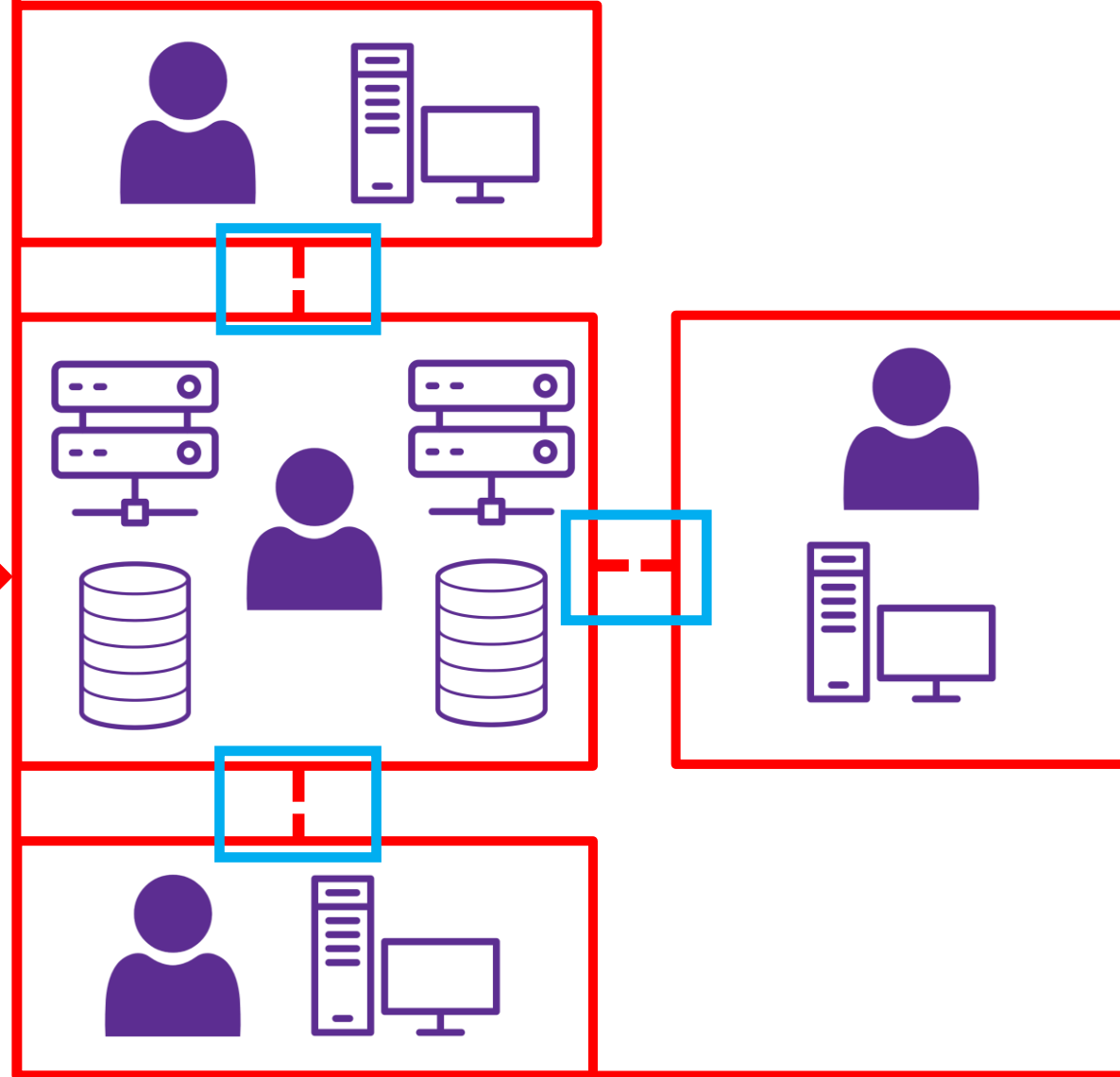


+ Complexity

Move to Remote Working

+ Risk

Post-COVID Reality (Decentralized Model)



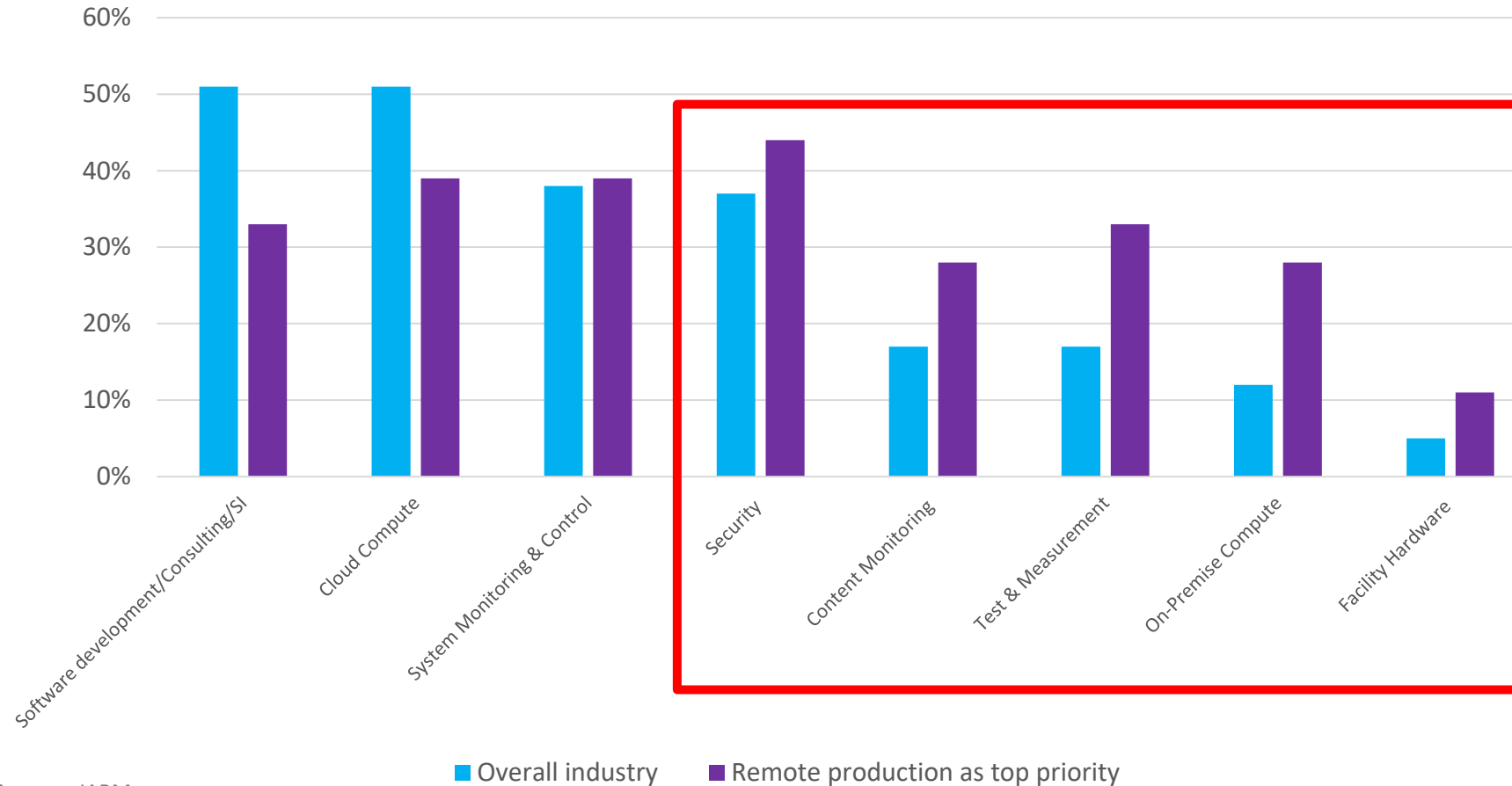
Sources: IABM



Remote Production Investment

Managing risk & complexity

Top Investment Areas in Support



Sources: IABM

+ Security/
Monitoring
(cybersecurity,
monitoring etc.)

+ On-Premise
(blades/servers)



Media Convergence: Current & Futuristic Perspectives

Lorenzo Zanni, Head of Knowledge, IABM



Sports Business Models

Under pressure: overview of pressure drivers

Pay TV

Cord-cutting, changing viewing habits, sports rights funding all exerting pressure. Content owners moving to direct-to-consumer models are reallocating resources to this transition, rationalizing legacy (e.g., ESPN and NBCU)

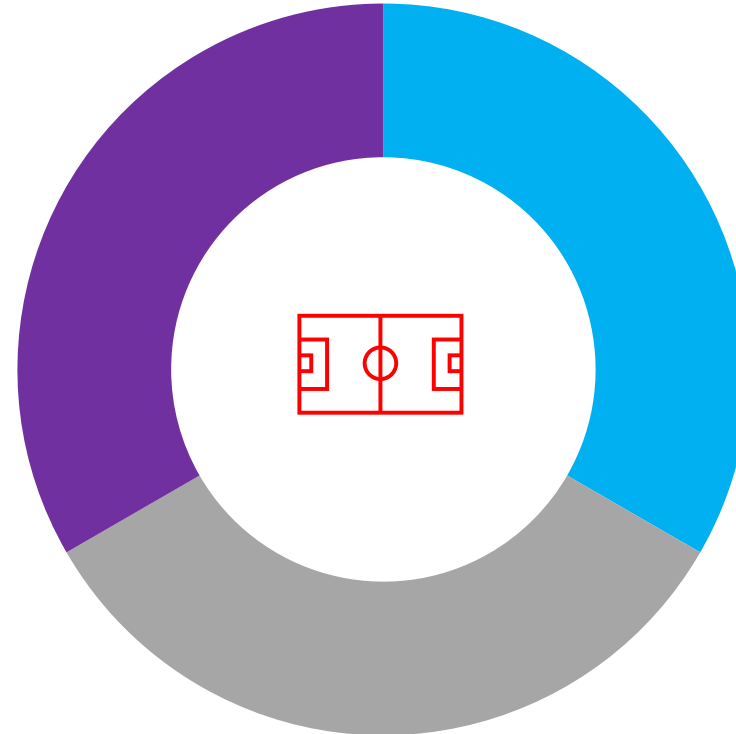
Advertising

Revenues significantly down in H1 2020 though sports remain a unique way to reach audiences for advertisers. Revenues slightly recovered in H2 2020 though sports ratings continue to be down – ESPN advertising bounced back in Q4

Public

Public funding models are under pressure due to the impact of the direct-to-consumer transition. Delphine Ernotte, CEO of France Televisions and EBU president said to the FT in January 2021: “We feel weak. But it is better to feel weak. If you feel weak, you react”

COVID-19



Direct-to-Consumer

Financial Pressure

Changing Viewing Habits

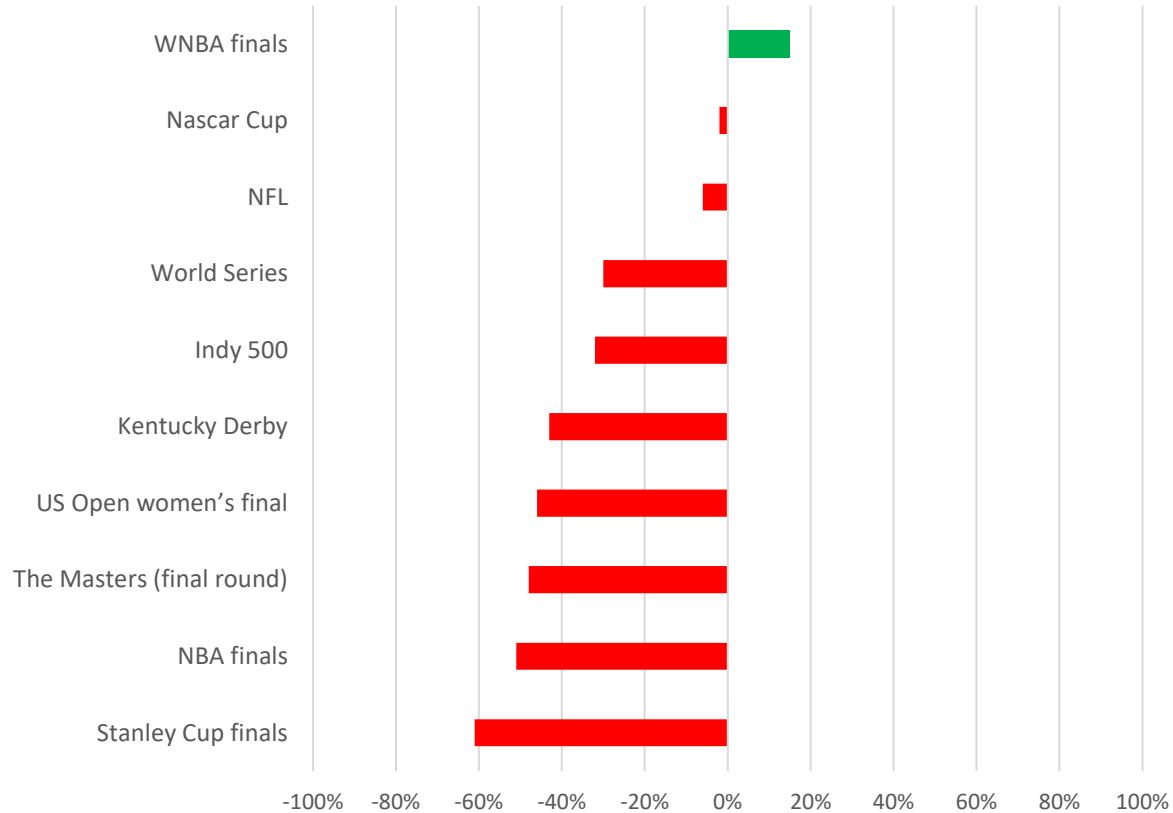
Sources: IABM, FT

Sports Viewing Habits

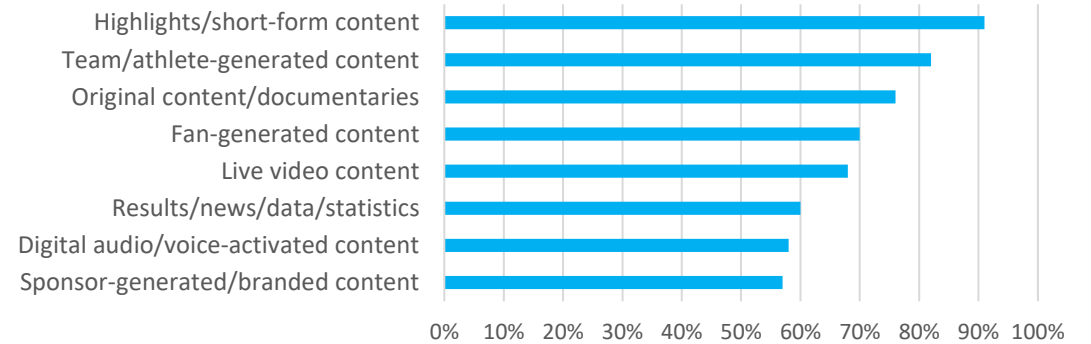
Changing



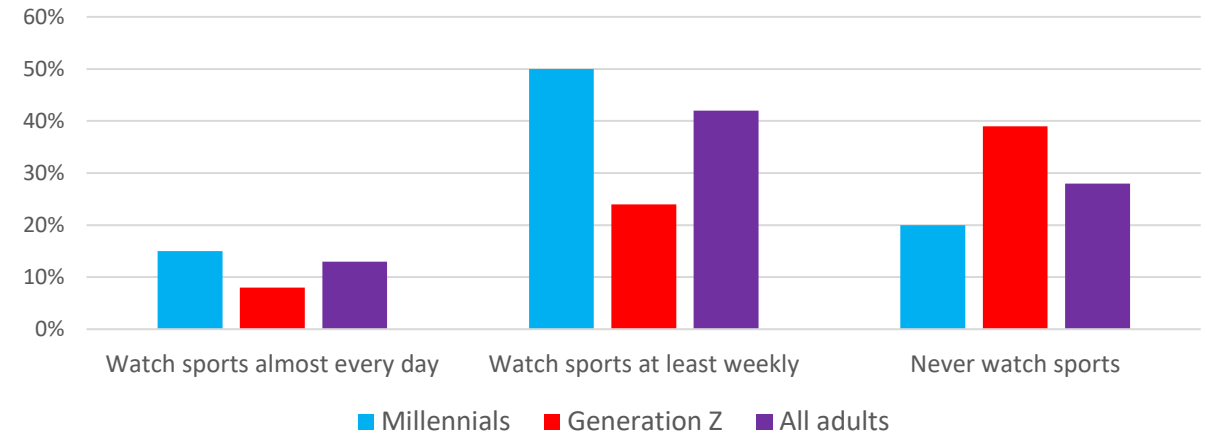
TV ratings for major US sports
(% difference between 2020 and 2019)



Expected growth of sports media consumption



Frequency of watching live sports in the US by generation



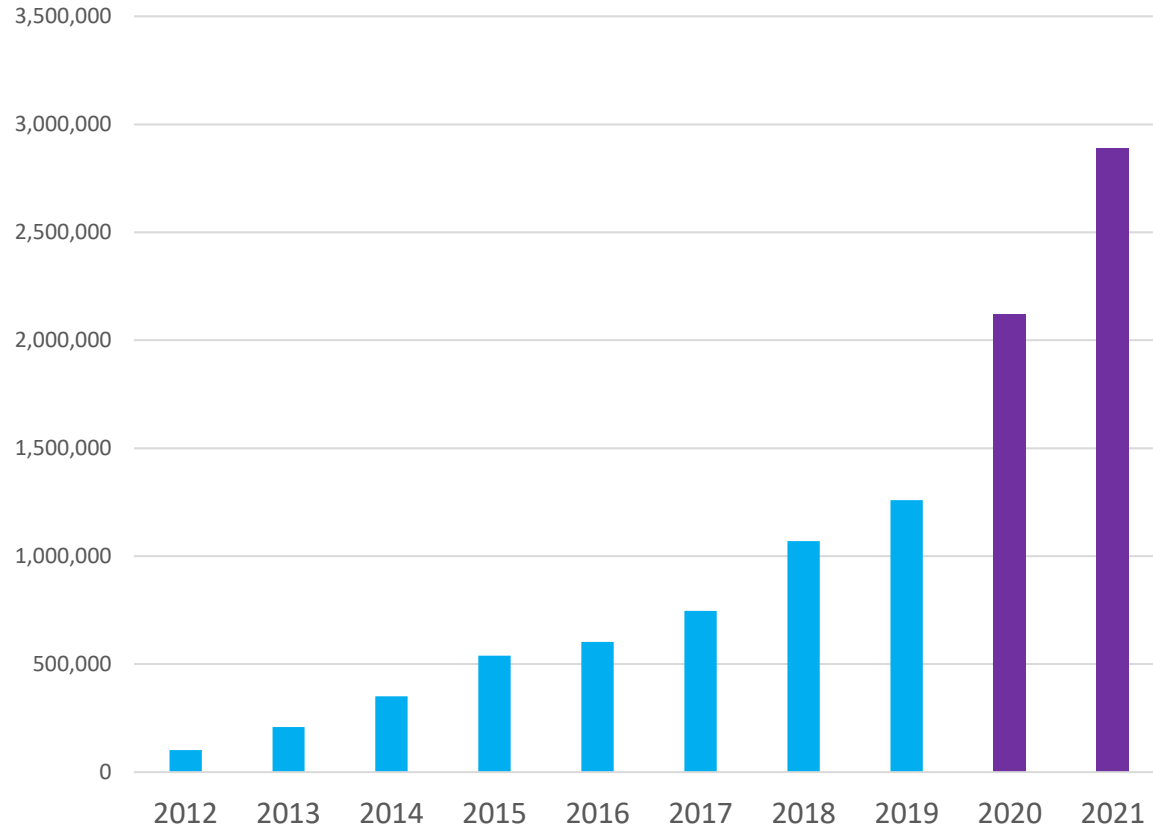
Sources: IABM, Sports Media Watch, Morning Consult



Current Media Convergence

Sports as the guinea pig for business model innovation – Demand for interactivity

Average concurrent Twitch viewers (in thousands)



Sources: IABM, Twitch Tracker

Social, interactivity, convergence...

More sports broadcasters delivering content packages to Twitch and social media platforms

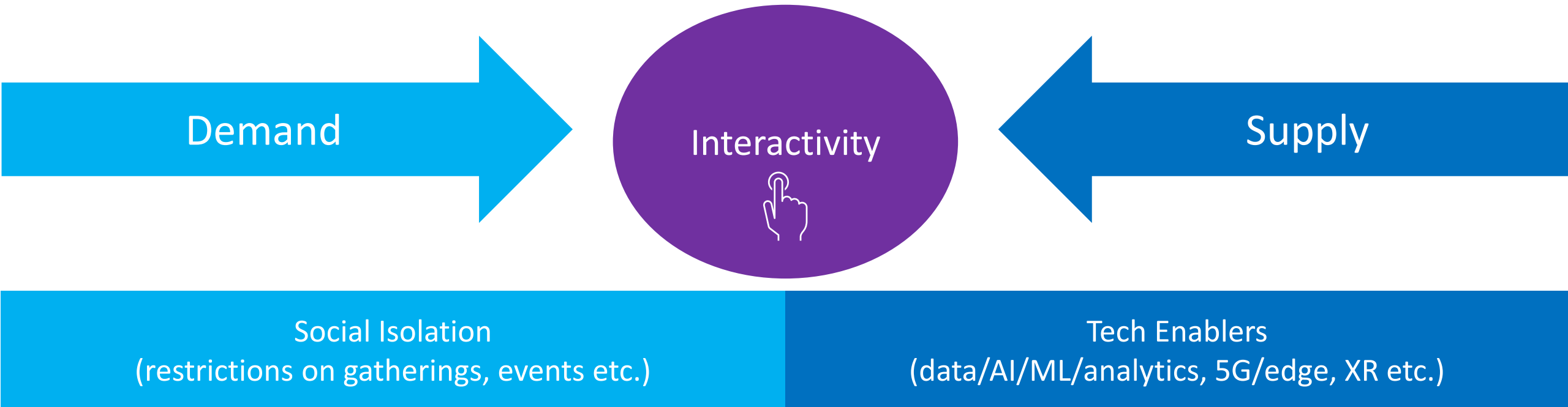
More sports broadcasters designing interactive experiences, **59%** plan to increase investment in Consume

Social and interactivity are also driving a convergence in business models



Current Media Convergence

Interactivity – Demand and supply



Sources: IABM



Current Media Convergence

Sports as the guinea pig for business model innovation – Engagement

FuboTV acquires Vigtory in January 2021

*“We believe **online sports wagering** is a highly **complementary business to** our sports-first live TV **streaming** platform. We do not see wagering as simply an add-on product to FuboTV. Instead, we believe there is a real **flywheel opportunity with streaming video content and interactivity**. We not only expect sports wagering to become a new line of business and source of revenue, but we also expect that it **will increase user engagement on FuboTV resulting in higher ad monetization, better subscriber retention** and reduced subscriber acquisition costs.”*

David Gandler
Co-founder and CEO
FuboTV
(January 2021)

Sinclair presenting at Media, Internet & Telco Conference

*“We are going to be jointly [with Bally Sports] developing additional programming, which is going to go on our air, which will support and be reasons not only for people to tune in but **also to engage more on the sports betting platforms**. The other thing that we'll work on is a **watch-and-play experience**. So that's not ready yet, but that is on the drawing board between us and Bally to create a next-generation watch-and-play experience that is going to revolutionize the **way people watch sports today** and really **make it much more like playing a video game**.”*

Christopher S. Ripley
President and CEO
Sinclair Broadcast Group
(March 2021)

And Fox Bet...



Sources: IABM



Current Media Convergence

Sports as the guinea pig for business model innovation - Differentiation

3 Facets of Differentiation

Live a means to differentiate from crowded D2C on-demand content market

Direct-to-Consumer

Differentiation of revenue streams through convergence for financial transition

Financial Pressure

Differentiation of experiences through convergence for fan engagement

Changing Viewing Habits

“Diversifying our revenue and cash flow remains a strategic priority, and we believe our 2020 results demonstrate the complementary nature of our radio business with our digital and Esports operation.”

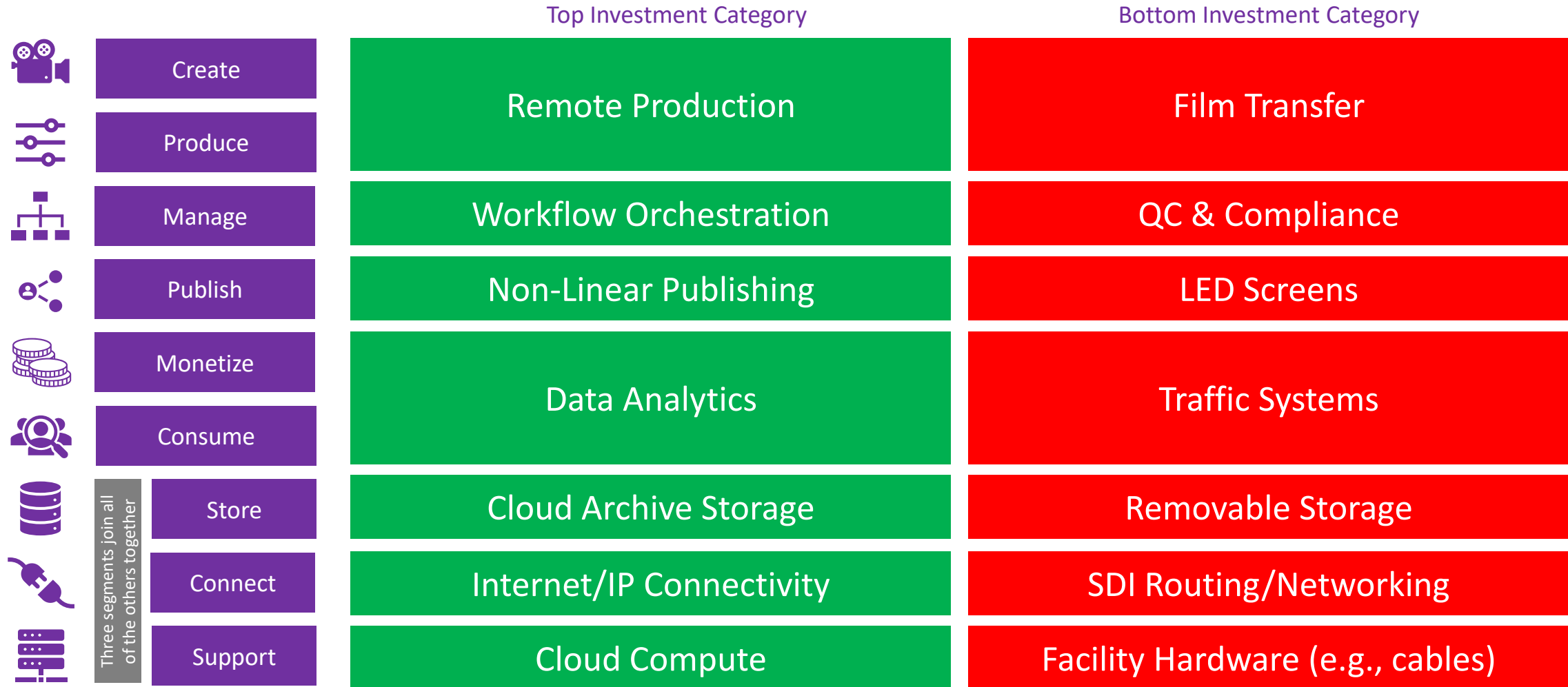
Barbara Caroline Beasley
CEO and Director
Beasley Broadcast Group
(February 2021)

Sources: IABM



Current Media Convergence

Media tech investment outlook by segment - COVID-19 effect



Sources: IABM



Current Media Convergence

Media tech investment outlook by segment – Data-driven focus

FuboTV acquires Vigtory in January 2021

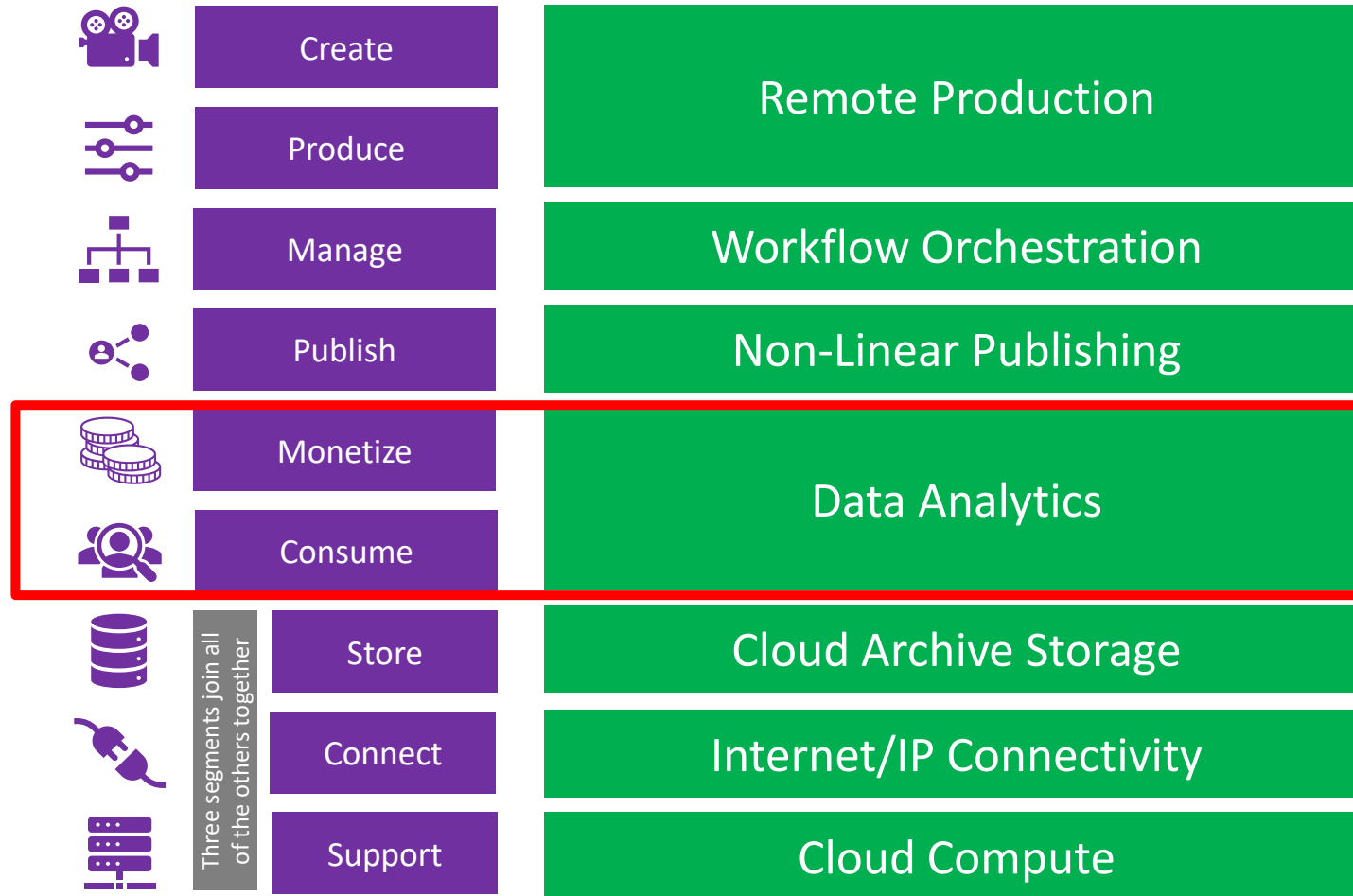
*“We not only expect sports wagering to become a new line of business and source of revenue, but we also expect that it **will increase user engagement on FuboTV resulting in higher ad monetization, better subscriber retention and reduced subscriber acquisition costs.**”*



Interactivity as:

- A tool to improve digital experiences
- A tool to gather more data on consumers
- A tool to achieve further differentiation of business models

Top Investment Category



Sources: IABM



Current Media Convergence

Data-driven focus – FuboTV case study

FuboTV at Needham & Co. Technology & Media Conference

We are very **focused on our ability to manage our data and to analyze and leverage that data in ways that will allow us to find new opportunities**. And what we typically do is we experiment around everything. That includes pricing. We've been experimenting around packaging... But there's also **synergies between the information we're getting across advertising, wagering, our subscription plan**. So again, I look at this as a very small Amazon, if you will, if you can think that way, creatively. You have to think about the future, right? That's the whole job. But **adding this wagering, I'm looking for things we can sell that can add \$10 to \$15 to \$20 of monthly revenue per customer**. And I think it's quite possible because it's just - we're seeing success in the way we're managing our data.

David Gandler
Co-founder and CEO
FuboTV
(January 2021)

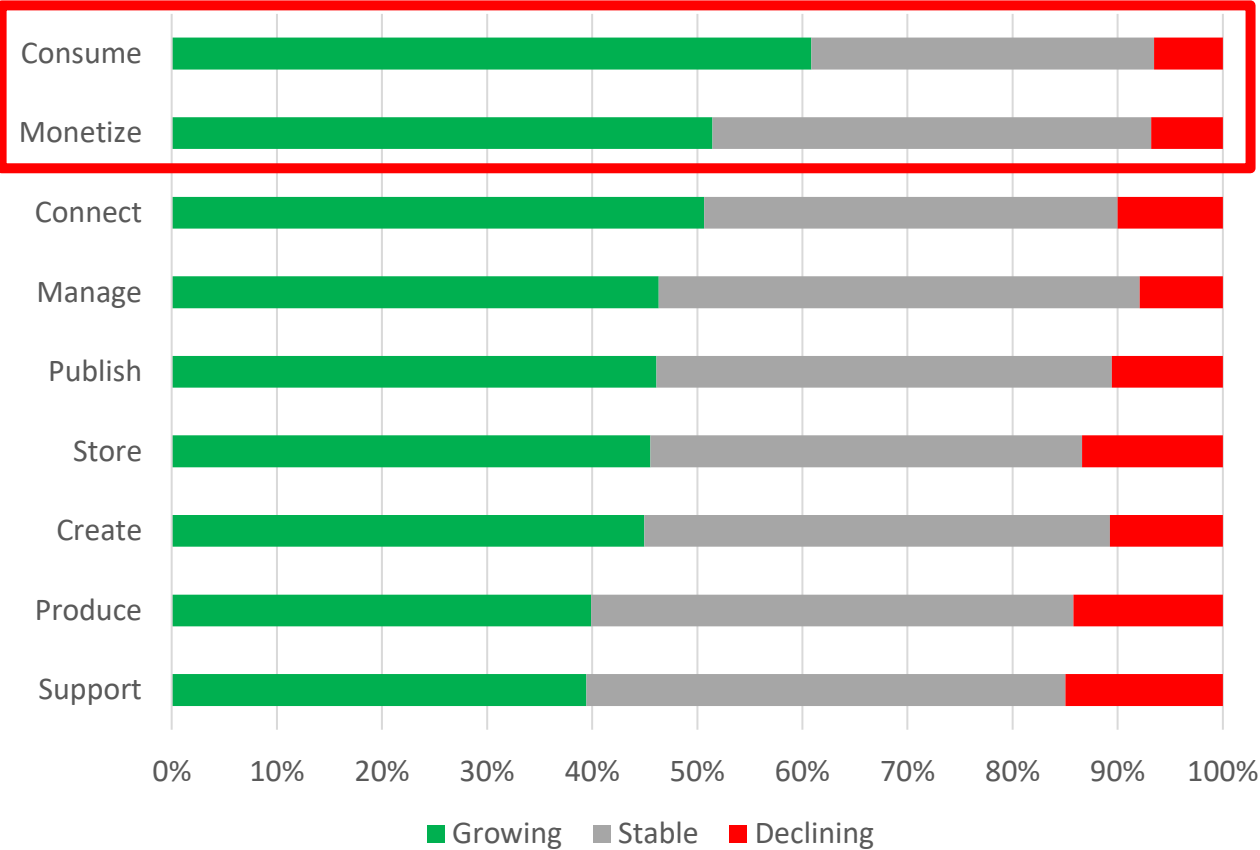
Sources: IABM



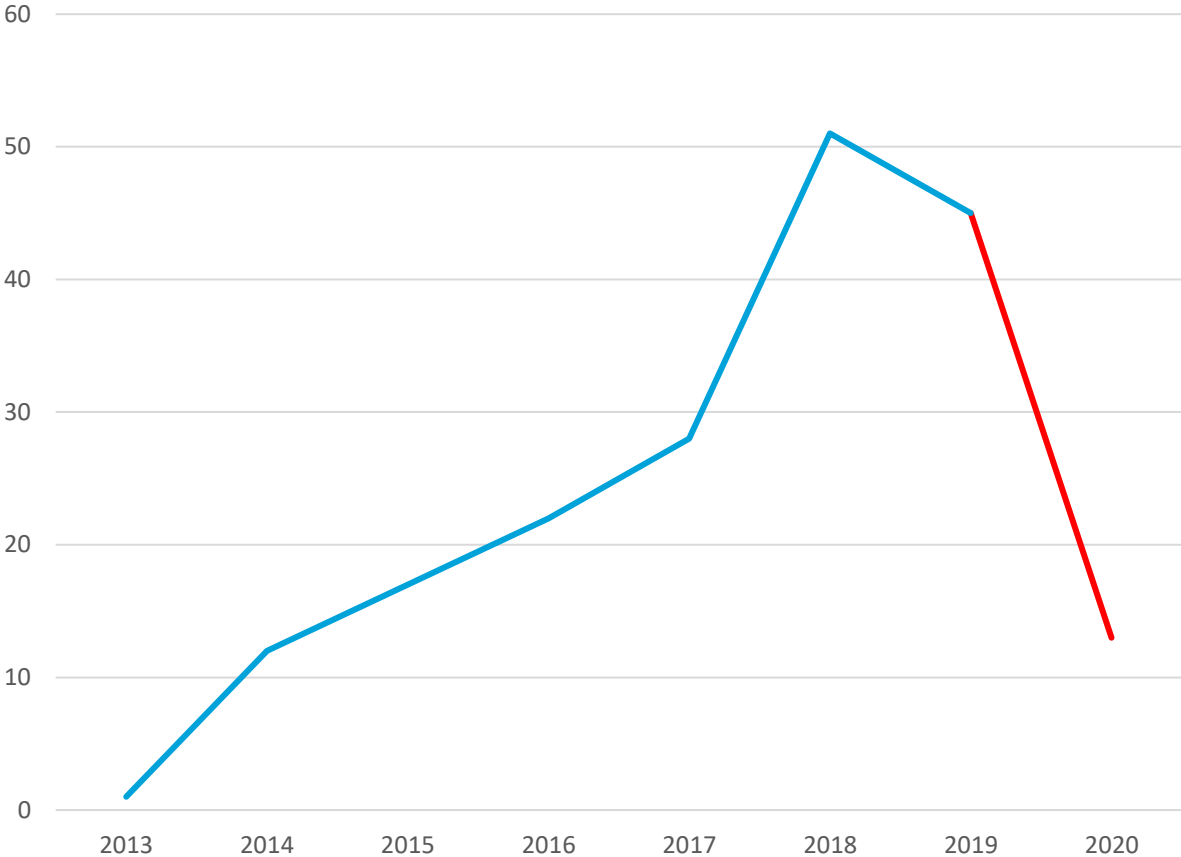
Current Media Convergence

Digital experiences & monetization

Investment Outlook by Media Companies



Number of UHD services deployed



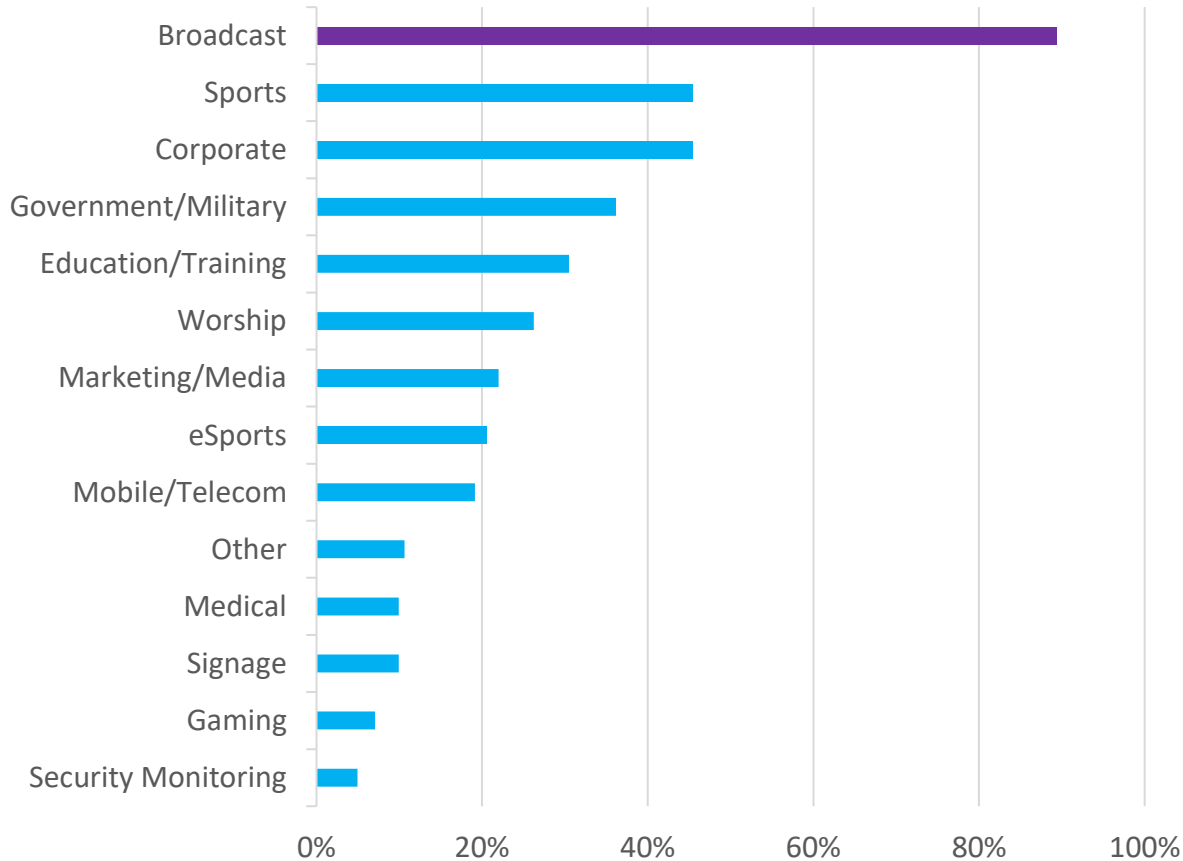
Sources: IABM, UHD Forum



Current Media Convergence

Technology convergence

Supplier Markets



Tech Convergence

More tech buyers using commodity tools or looking outside of broadcast (Vmix, DAM/MAM convergence)

More parallel markets needing M&E tech to produce, manage and deliver media content due to digital demand

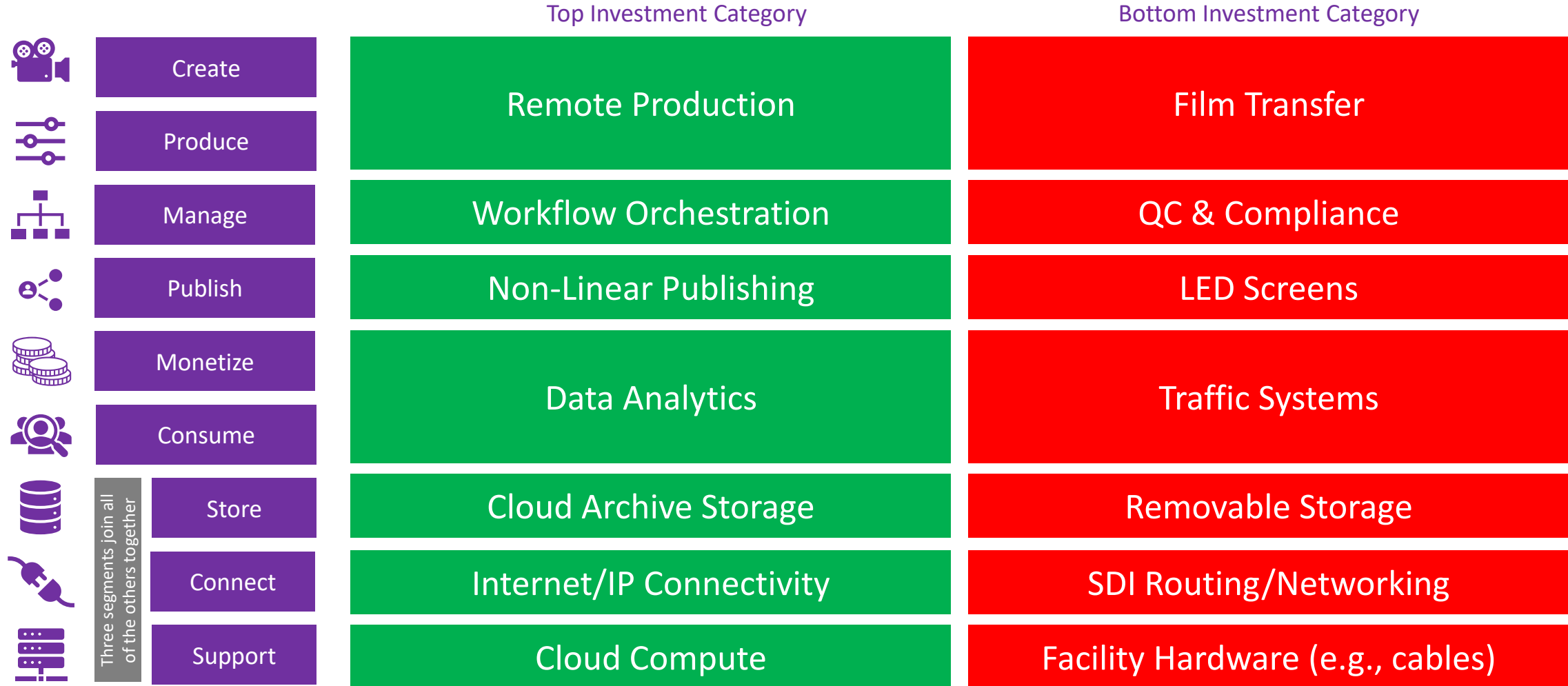
More suppliers pursuing these parallel markets as demand grows while broadcast investment dwindles

Sources: IABM



Future Media Convergence

Media tech investment outlook by segment - COVID-19 effect

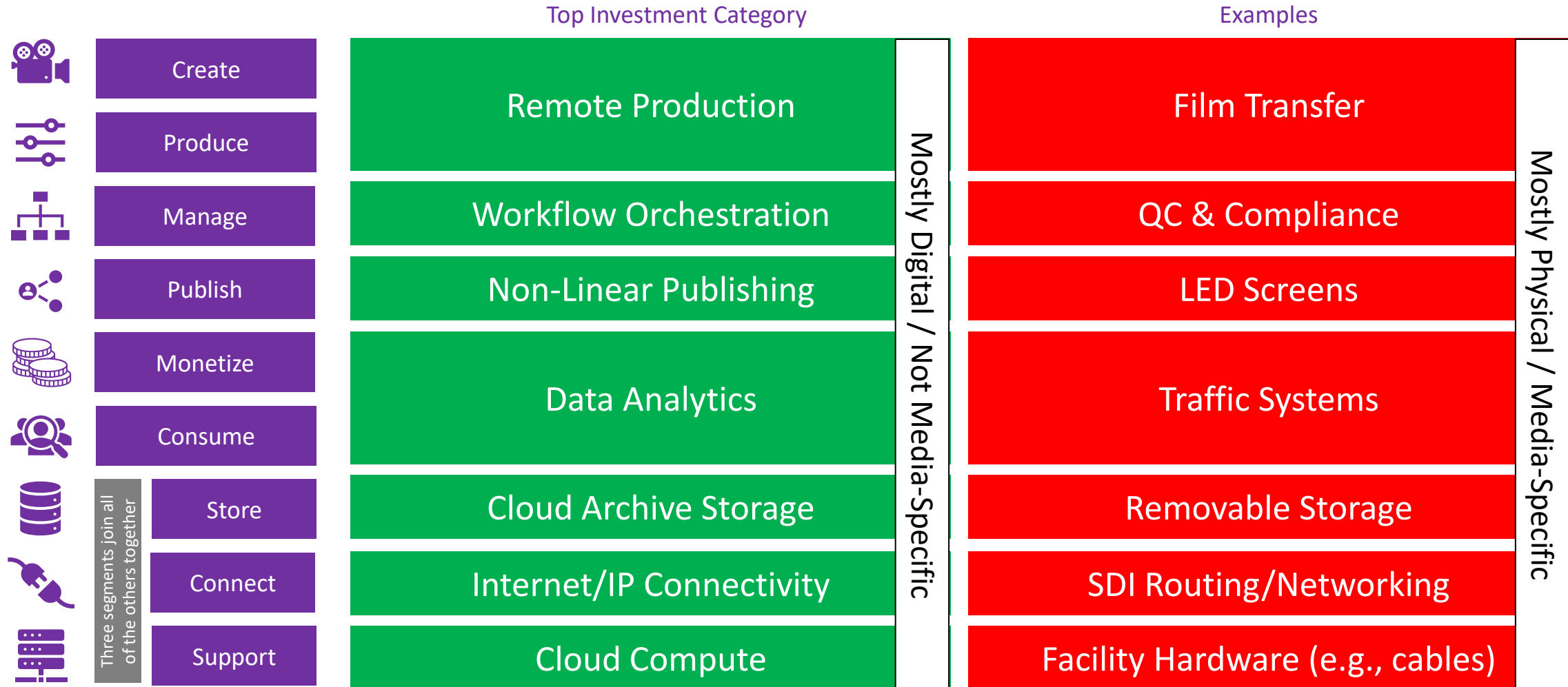


Sources: IABM



Future Media Convergence

Media tech investment outlook by segment – Digital & Physical investment

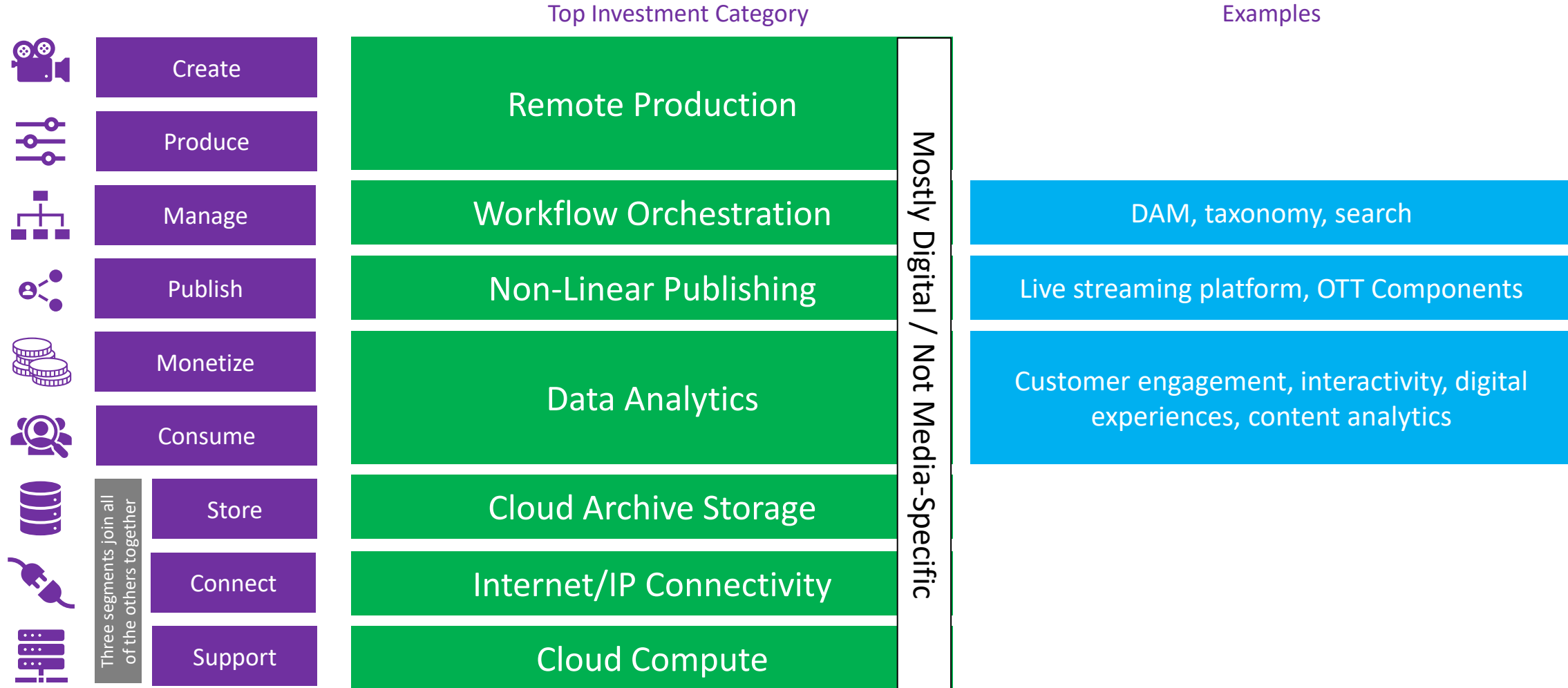


Sources: IABM



Future Media Convergence

Media tech investment outlook by segment – Examples of Convergence

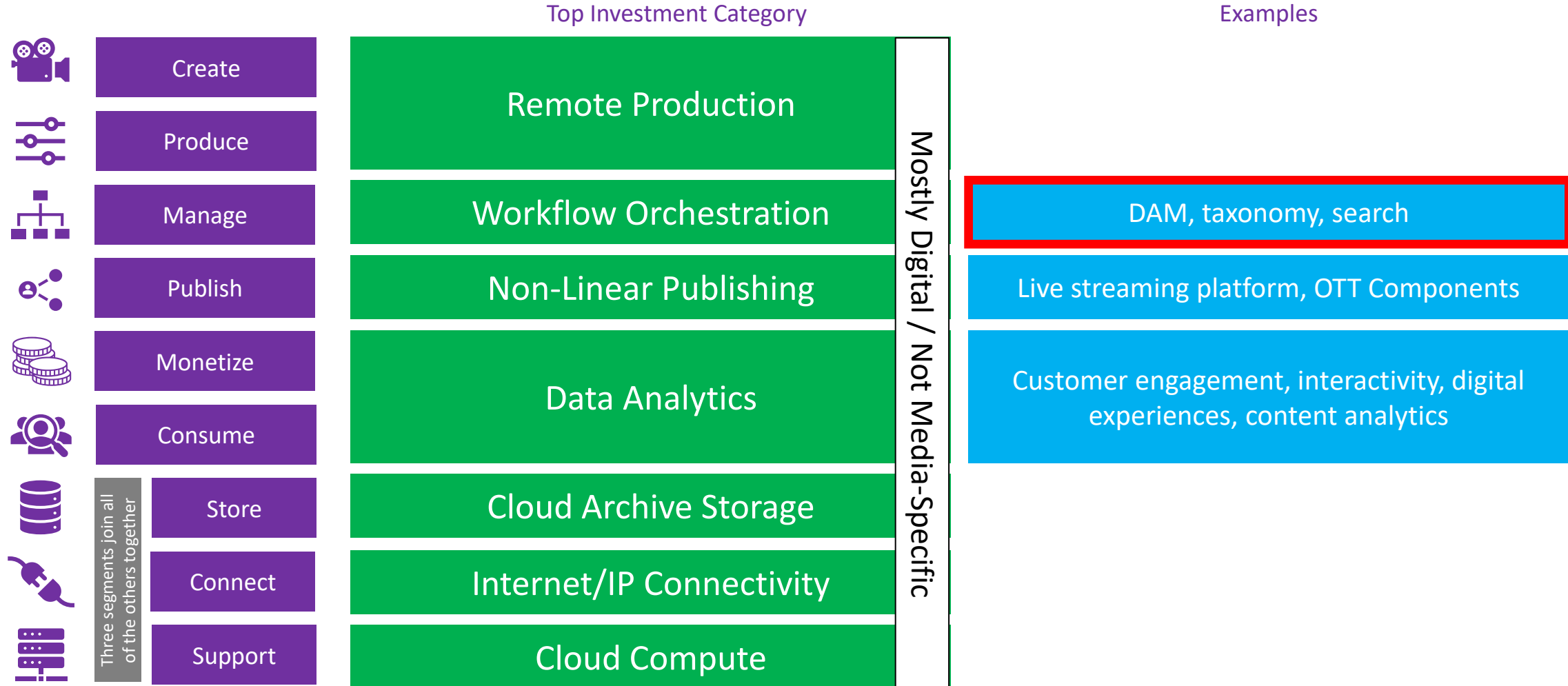


Sources: IABM



Future Media Convergence

Media tech investment outlook by segment – Examples of convergence



Sources: IABM

Future Media Convergence

Examples of Convergence - Manage



When it comes to managing and monetizing content, media technology is moving beyond the traditional concept of media asset management (MAM) system, with clearly defined, media-specific use cases, even borrowing ideas from the digital asset management market.

- **Content Sharing:** asset management systems are increasingly focused on enabling seamless content sharing. Think about the “collection” concept, hence being able to share groups of assets with users through a web platform or just a simple link.
- **Monetization:** a monetization layer is being built on top of some of these systems, particularly when it comes to the relationships between content owners and distributors. This could become an interesting area of development even in the case of relationships between content owners and aggregators.
- **Analytics:** analytical tools are becoming integral parts of asset management systems.

Sources: IABM

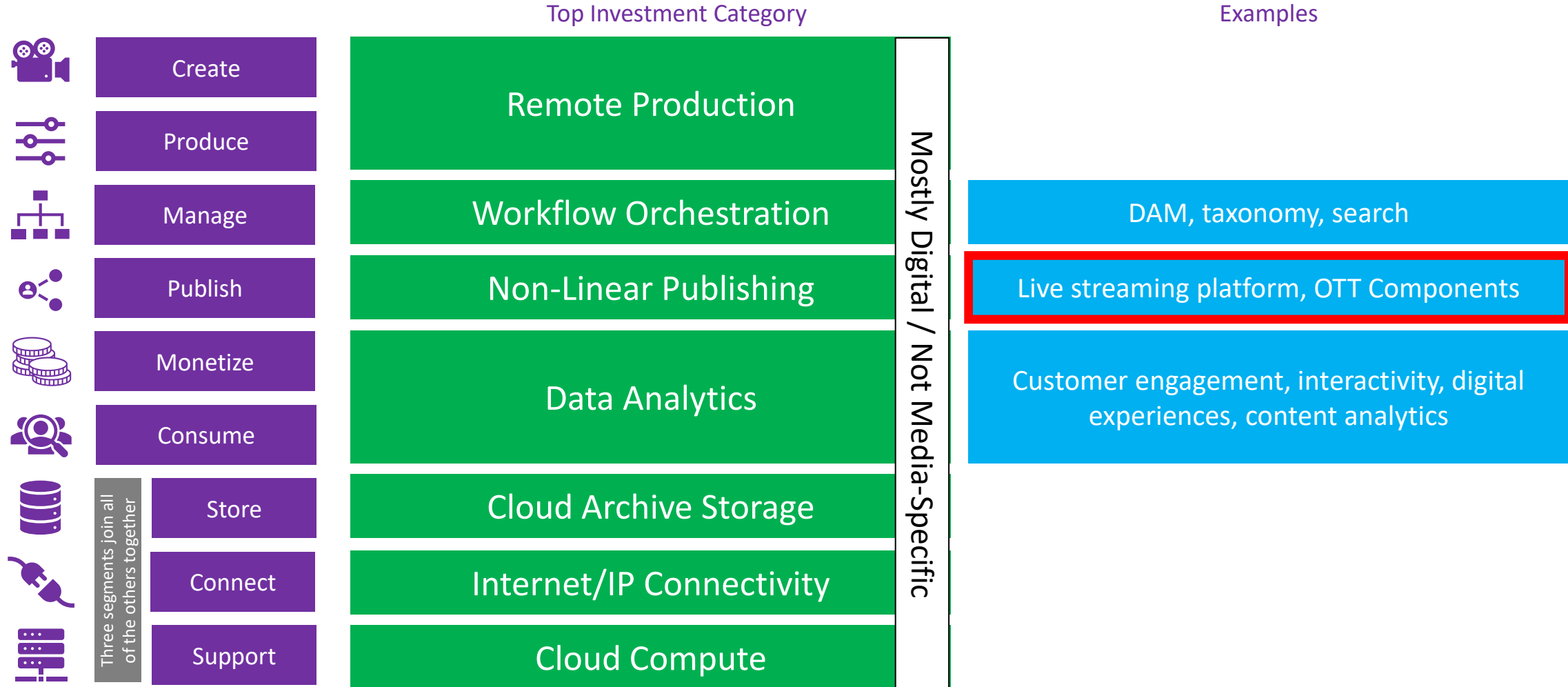
The top screenshot shows the Newsbridge website. It features a navigation bar with links for FR, EN, Features, Customer Stories, Integrations, Blog, Pricing, LOG IN, and a REQUEST A DEMO button. The main headline reads "Turn minutes of video footage into thousands in revenue". Below this, a sub-headline states: "Give users the ability to find media sequences they need for their story, in seconds. By showcasing your media assets via auto-enriched Collections paired with a powerful semantic search engine, discover the possibility of a platform that generates new revenue streams for your organization." The interface displays a "Moon Media COLLECTION" with a search bar and three asset categories: "Thomas Pesquet", "Rugby World Cup - Group B", and "Olympic Games Medals". Each category shows a grid of thumbnail images.

The bottom screenshot shows the Graymeta website. It has a navigation bar with links for SOLUTIONS, PRODUCTS, CUSTOMER STORIES, COMPANY, and SUPPORT. The main headline reads: "CURIO SAVES YOU TIME AND REDUCES COSTS BY MAKING DIGITAL ASSETS SUCH AS VIDEOS, IMAGES, AND DOCUMENTS EASIER TO SEARCH, DISCOVER AND USE." Below this, a sub-headline states: "Curio unlocks information hidden inside assets such as words, images, logos, sounds and noises, faces and people and by leveraging machine learning and AI services to enrich these assets with DNA level metadata." The background of the Graymeta page features a close-up image of a person's face.



Future Media Convergence

Media tech investment outlook by segment – Examples of convergence



Sources: IABM



Future Media Convergence

Examples of Convergence - Publish

Brightcove Investor Day

*“When the pandemic first hit, it was a reaction that was an urgent request for a tactic to have **something that could communicate widely to employees**. And I think now what customers are seeing is that they can reach a much broader scale. They can reach employees across the world in a much more efficient manner, where everybody feels like they are on the same playing field, where they can communicate more optimally, and they will continue to do that. **They are now making this part of their strategy as opposed to something they just have to do in the pandemic. The same goes for sales and marketing, where previously, video was a nice to have. Now organizations are looking for a full video content management platform** because they know they are going to have to create more, because that is a way that can reach more people on a greater scale and actually connect with them greater, and it’s becoming a core part of marketing strategy.”*

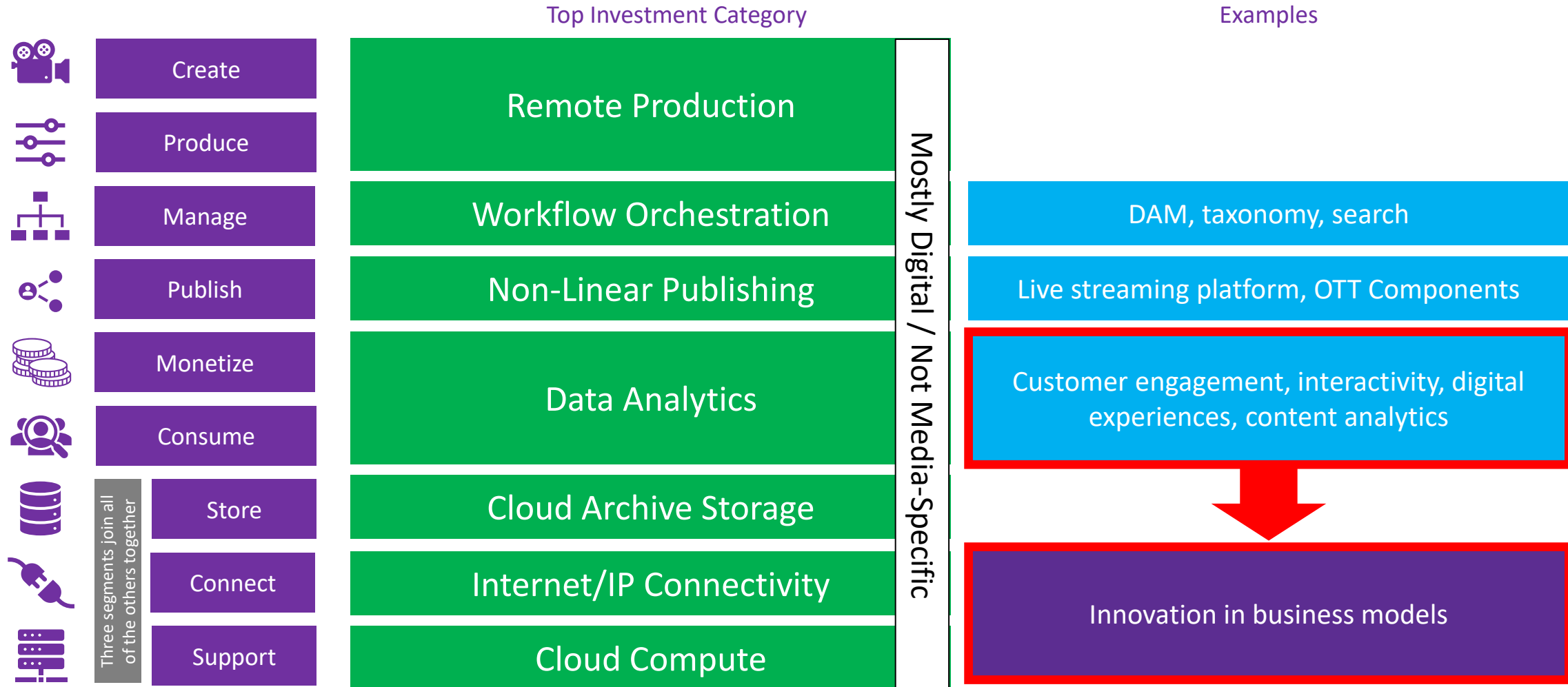
Jennifer Smith
CMO
Brightcove
(March 2021)

Sources: IABM



Future Media Convergence

Media tech investment outlook by segment – Examples of Convergence



Sources: IABM



Future Media Convergence

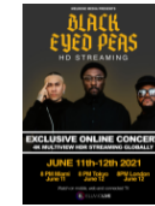
Interactivity is not just a nice to have – Eluvio case study

ELUVIO LIVE

A 4K streaming and ticketing platform for artists and publishers direct to fans, based in blockchain. Built on the Eluvio Content Fabric, the new decentralized and advanced technology platform for internet video.

Quite a good business model too...

Sources: IABM, Eluvio



HD STREAMING

HD (1080p) quality streaming of the Black Eyed Peas' entire live concert. Experience the six-time Grammy award-winning, genre-bending pioneers' first event in front of a live audience since the release of their hit album Translation. This exclusive streaming event features the original members – will.i.am, Taboo, and apl.de.ap – and special surprise guests that fans will not want to miss, streaming directly to your device anywhere in the world. Available showtimes for the global audience: 8 PM Miami June 11, 8 PM Tokyo June 12, or 8 PM London June 12.

\$10.00 8 PM Miami Time

June 12, 2021 · 2:00 AM CEST

1

ADD TO CART



4K STREAMING MULTIVIEW

Full 4K quality streaming of the Black Eyed Peas' entire live concert including interactive multi-camera views (requires 20 Mbps of downstream Internet bandwidth). Experience the six-time Grammy award-winning, genre-bending pioneers' first event in front of a live audience since the release of their hit album Translation. This exclusive streaming event features the original members – will.i.am, Taboo, and apl.de.ap – and special surprise guests that fans will not want to miss, streaming directly to your device anywhere in the world. Available showtimes for the global audience: 8 PM Miami June 11, 8 PM Tokyo June 12, or 8 PM London June 12.

\$30.00 8 PM Miami Time

June 12, 2021 · 2:00 AM CEST

1

ADD TO CART



4K STREAMING MULTIVIEW WITH VIP MEET & GREET

Full 4K quality streaming of the Black Eyed Peas' entire live concert including interactive multi-camera views as well as a live VIP "backstage experience" with the Black Eyed Peas to hear directly from them about getting back on stage in front of their incredible fans (requires 20 Mbps of downstream Internet bandwidth). Experience the six-time Grammy award-winning, genre-bending pioneers' first event in front of a live audience since the release of their hit album Translation. This exclusive streaming event features the original members – will.i.am, Taboo, and apl.de.ap – and special surprise guests that fans will not want to miss, streaming directly to your device anywhere in the world. Available showtimes for the global audience: 8 PM Miami June 11, 8 PM Tokyo June 12, or 8 PM London June 12.

\$80.00 8 PM Miami Time

June 12, 2021 · 2:00 AM CEST

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ADD TO CART

Future Media Convergence

A very futuristic view

- Some companies are increasingly utilizing media for external thought leadership.
- Other companies (e.g., Spotify) have made announcements regarding permanent flexible working arrangements, meaning that they'll arguably need tools to engage with their employees.

ING ON AIR

BNR Nieuwsradio

Business

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JUN 18, 2019

ING On Air: 'ING Ventures: accelerating the pace of innovation' >

Guest: Benoît Legrand, CEO ING Ventures

[▶ PLAY](#) 18 min

JUN 5, 2019

ING On Air: 'The power of platforms - What makes them so successful' >

Guests: Annerie Vreugdenhil, Head of Innovation Wholesale Banking and Katharina Herrmann, Head of Platforms & Beyond Banking Retail & SME.

[▶ PLAY](#) 22 min

JUN 4, 2019

ING On Air: 'How do you take innovation culture to the next level?' >

Guest: Benoît Legrand, Chief Innovation Officer

[▶ PLAY](#) 20 min

JUN 4, 2019

ING On Air: 'Why AI is shaping our world' >

Guest: Görkem Koseoglu, Head of Global Robotics/Artificial Intelligence.

[▶ PLAY](#) 22 min



Introducing Working From Anywhere

Posted on February 12, 2021 by Anna Lundström and Alexander Westerdahl



We have been discussing the future of work and what it will look like for a couple of years, and have always concluded that globalisation and digitalisation are drivers for a more flexible workplace, that is better for both the company and our people.

Then 2020 came. Overnight, we were forced to work from home, which was in and of itself a litmus test of our culture and values, and even though we are not yet on the other side of this pandemic, or the racial and social challenges that the last year has shed light on, we are proud to say that Spotify's culture stands strong. The events of the past year have accelerated my and the Executive Team's thinking about the future and we believe that the time to start transitioning into becoming a flexible/distributed-first company is NOW and we're pleased to introduce our Work From Anywhere program for all employees.



THANK YOU!!!