

Advancement of MAM: Unlocking the Value of Content

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DAM LA

November 1, 2012

Let's start by acknowledging the ubiquity of DAM's market opportunities, which extend far beyond M&E

The DAM market is expected to cross the billion dollar mark in 2015, driven by:

- Corporate MARCOM***
- Digital TV & HD mandates***
- Web 2.0 and IPTV***
- Mobile media***
- Post production workflows***

- Frost & Sullivan

By 2013, more than 25% of the content that workers see in a day will be dominated by pictures, video or audio, leading to the severe disruption of existing content strategies

-Gartner

According to a survey of 800 end-user IT organizations, software for management of images and video is the fastest-growing segment of the content management market

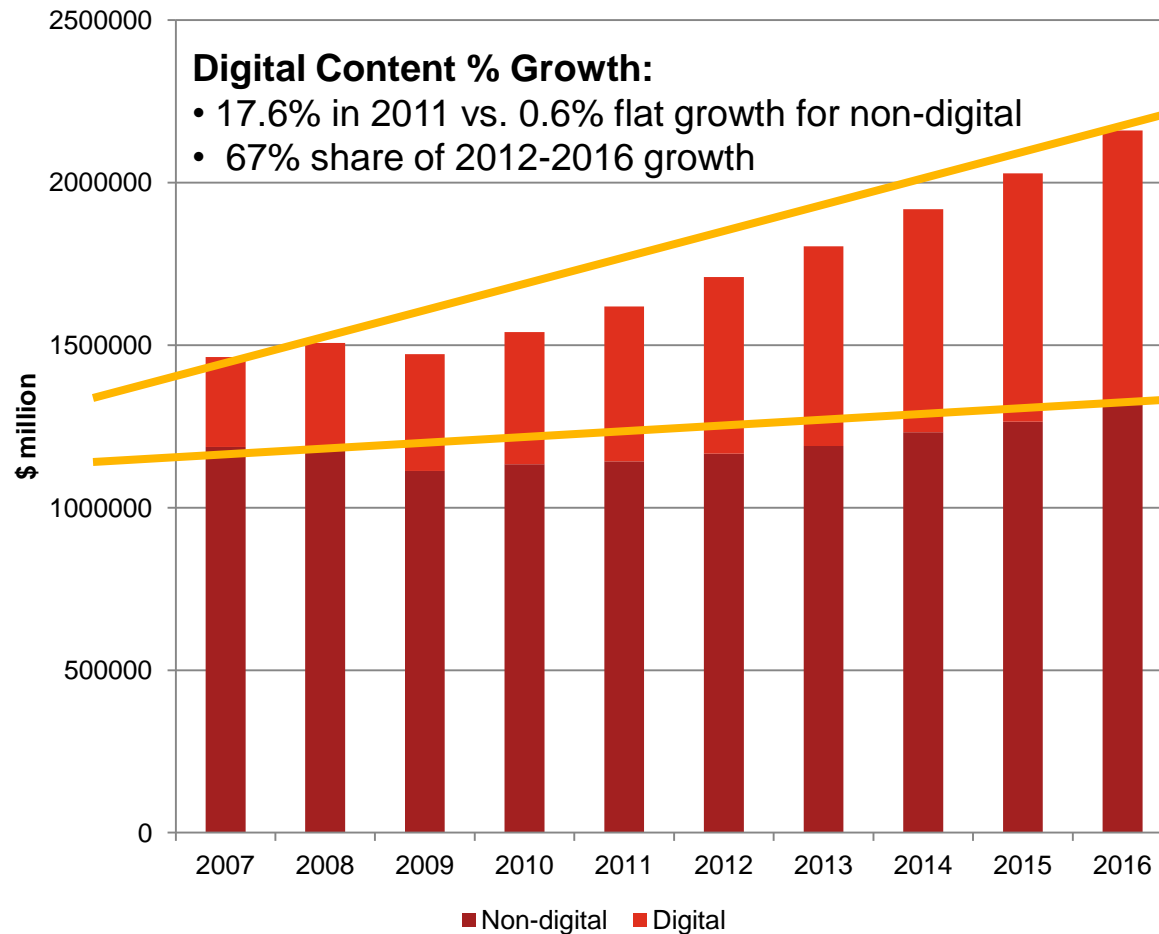
-Gartner

Video is the next generic data type for enterprise information, and the M&E industry 's experiences in video and other digital media are the bellwether for enterprise IT

Nearly half of information workers will have some type of personal video solution in 2016, up from just 15% today

-Forrester

But in M&E, digital spending drives global content growth... and the increased need to manage the assets



Digital is defined as:

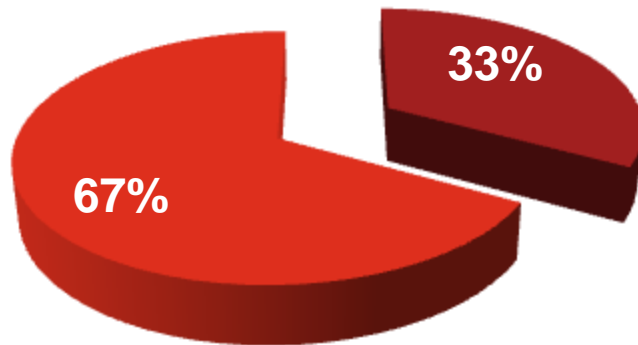
- Online and mobile Internet advertising
- Mobile TV subscriptions
- Digital music
- Electronic home video
- Online and wireless video games
- Digital consumer magazine circulation spending
- Digital newspaper circulation spending
- Digital trade magazine circulation spending
- Electronic consumer, educational, and professional books
- Satellite radio subscriptions
- Broadband and mobile Internet access

Global M&E consumer spending

Digital products are high-growth opportunities but, with lower per unit revenues

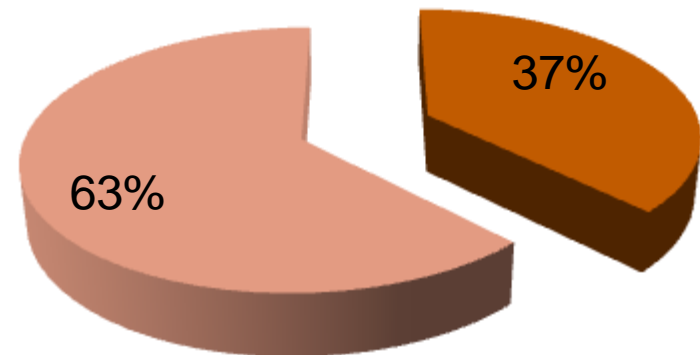
**WW Revenue Growth %
2011-2016**

■ Non-Digital ■ Digital



WW Revenue Share % 2016

■ Non-Digital ■ Digital

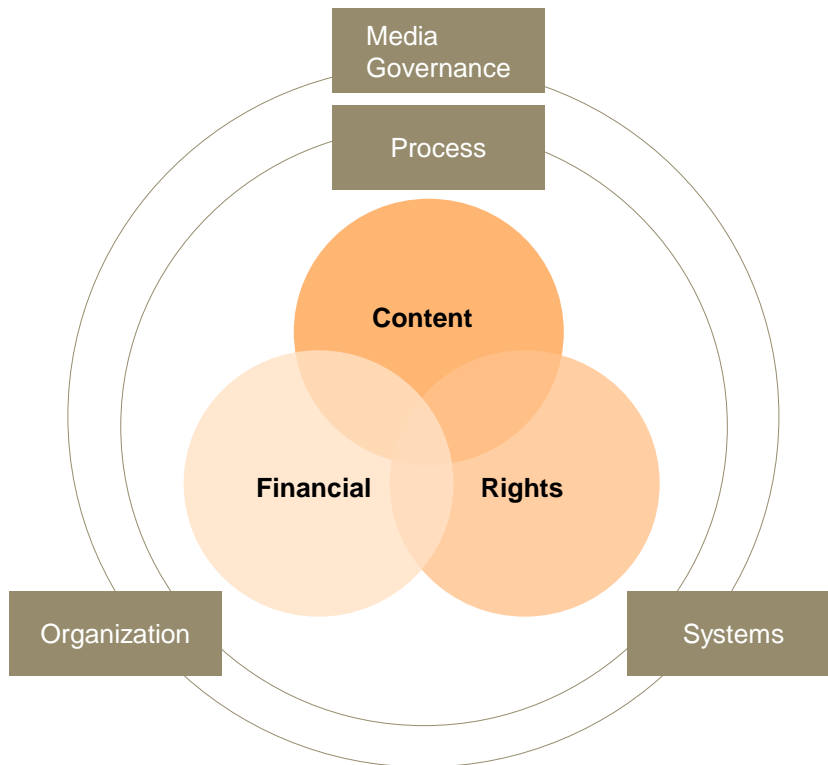


Source: PwC Global Entertainment and Media Outlook, 2012–2016

M&E companies need to balance a portfolio of strategic investments in high-growth digital products, while sustaining the profitability of lower-growth traditional content products

MAM is playing a more strategic role beyond cataloging, search, storage and archive

Monetizing the multiplatform content portfolio requires an integrated view to answer core questions



Decision-support in the digital content era requires the combination of knowing:

- 1. What content you have,***
- 2. The rights you have to monetize it, and***
- 3. The proper business model for those titles***

Monetizing the multiplatform content portfolio

Digital media enables the provision of content in cross-divisional bundles in finer slices of a program; driving the need for better analytics

Diversified Media Enterprise

Television Brands

Broadband video,

Social media

, e-commerce

Video Games & Licensing

Publishing

Enterprise Data Warehouse
For Advanced Analytics



The difficulty in managing such a content portfolio today, is the stovepipe nature of divisional IT infrastructures.

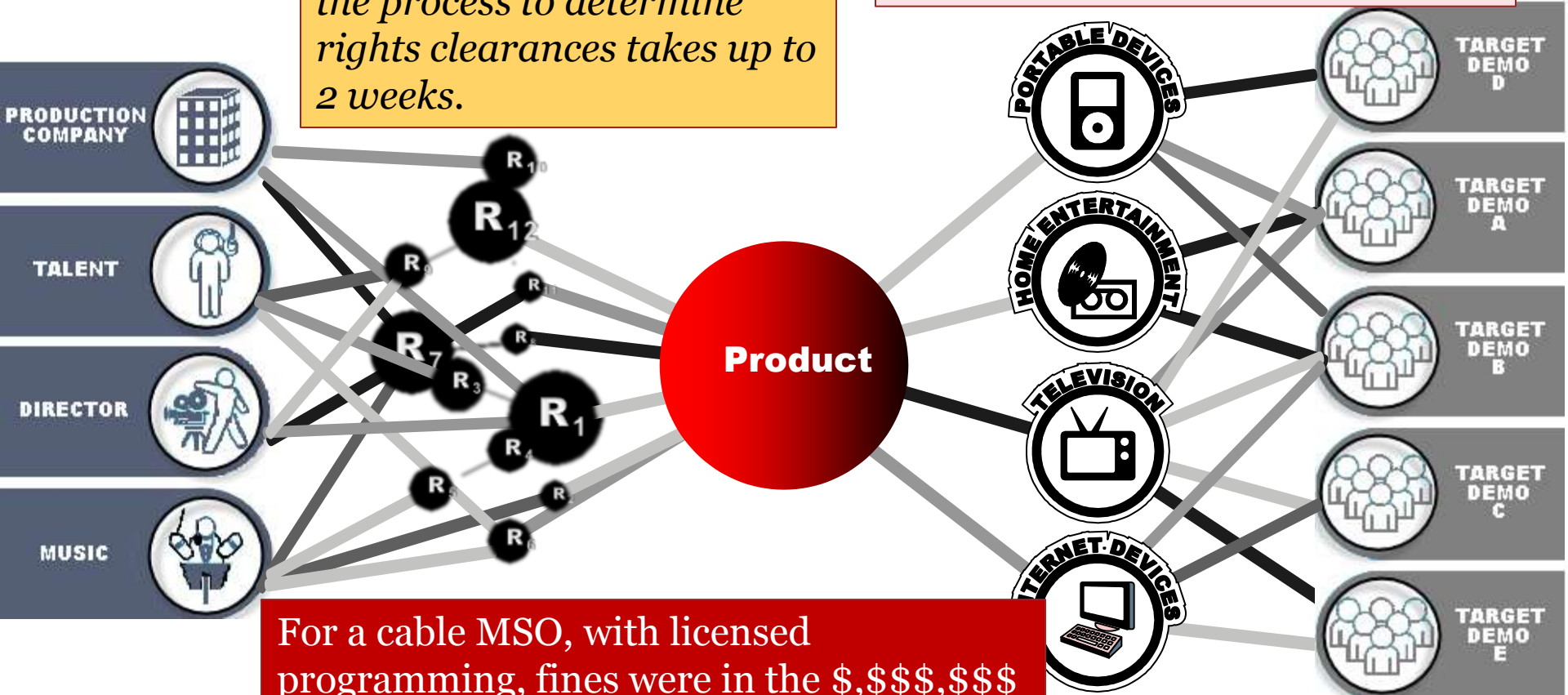
- A major Hollywood studio has over 75 MAM systems.
- Another studio has 80+ different Rights Repositories
- Another had 12+ separate BU data warehouses, and cannot perform cross-BU analytics
- Yet another cannot report P&Ls by titles

Ownership and Platform Rights

As multi-platform strategies emerge, an organization's ability to execute relies on managing the complexities of rights issues.

For a leading cable network, the process to determine rights clearances takes up to 2 weeks.

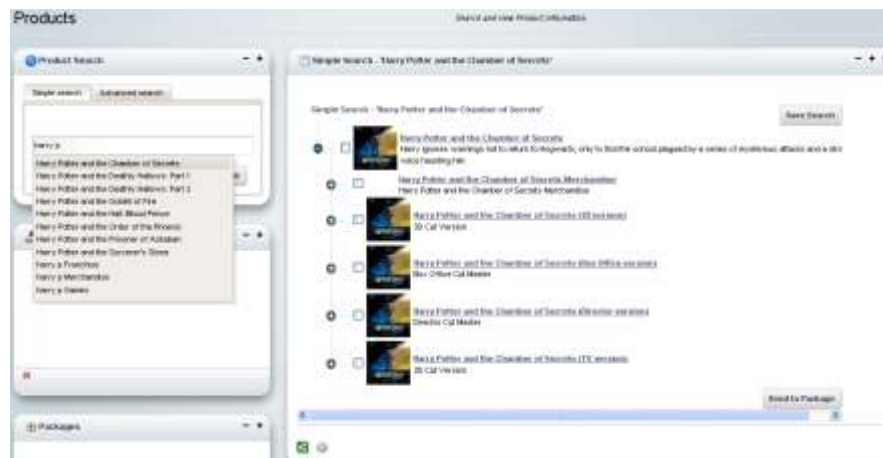
A major MSO's rights are buried in unsearchable contract PDFs.



For a cable MSO, with licensed programming, fines were in the \$,\$\$\$,\$\$\$ annually for violating contracts.

Effectiveness of marketing spend

Major Hollywood studios want to align marketing spend with real-time social buzz, website traffic, mobile apps, and consumer behavioral economics



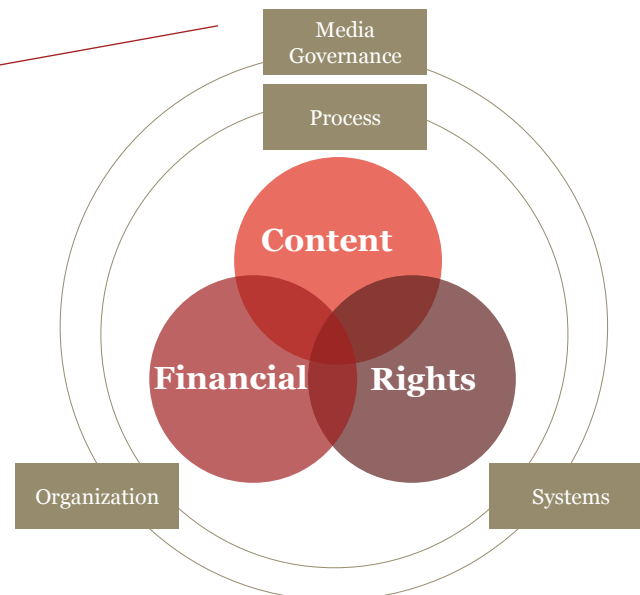
Leading practices

Content Value Management (CVM) framework

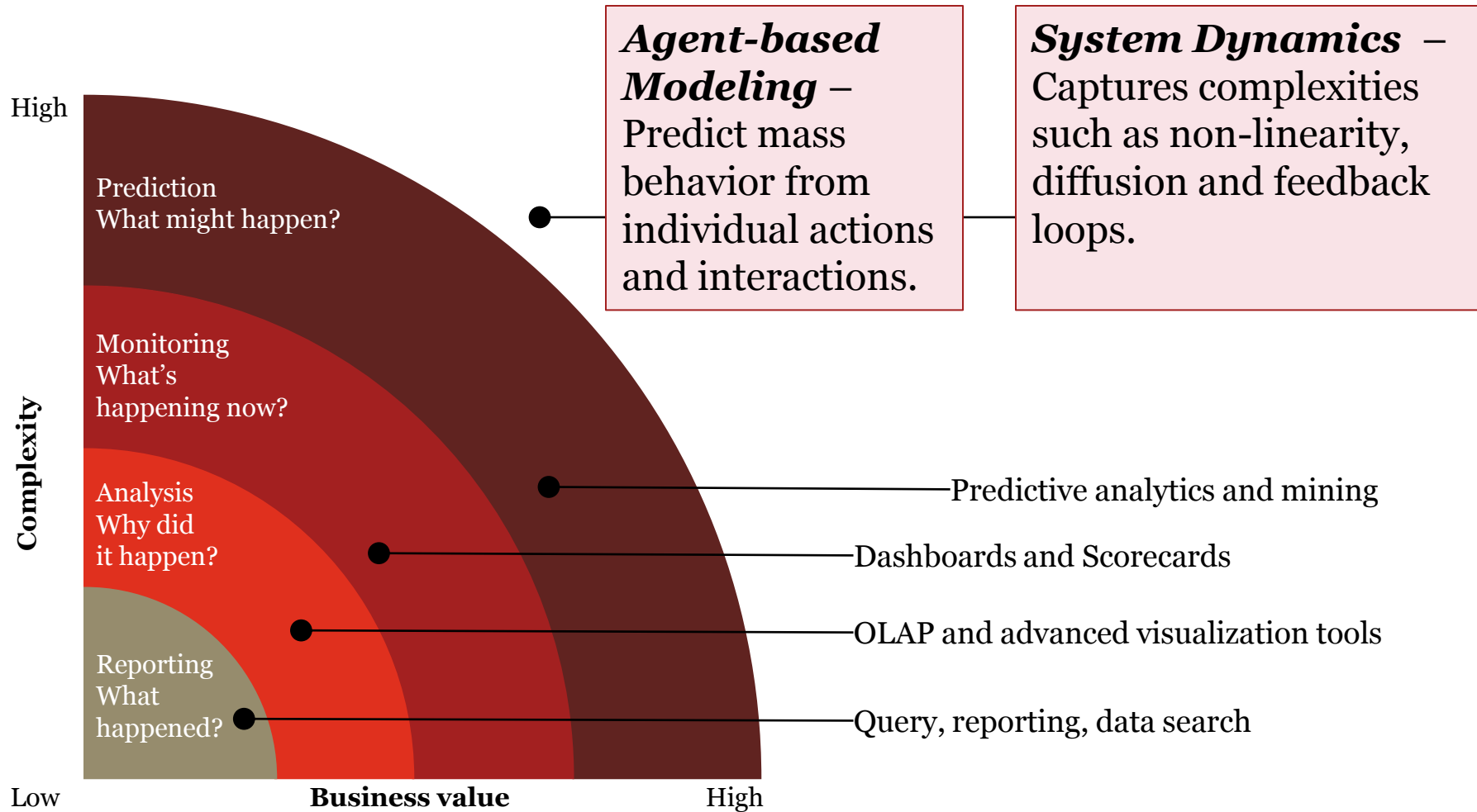
Content Value Management (CVM)

CVM is a decision-support framework that aggregates and correlates **content**, its intellectual property **rights** and associated **financials**, across channels and platforms, *promoting actionable understanding* across business units.

Diversified media enterprise					
Enterprise Layer – Finance, Legal, IT systems & infrastructure					
Broadcast TV	Cable TV	Theatrical	Syndication & licensing	New media	Home entertainment



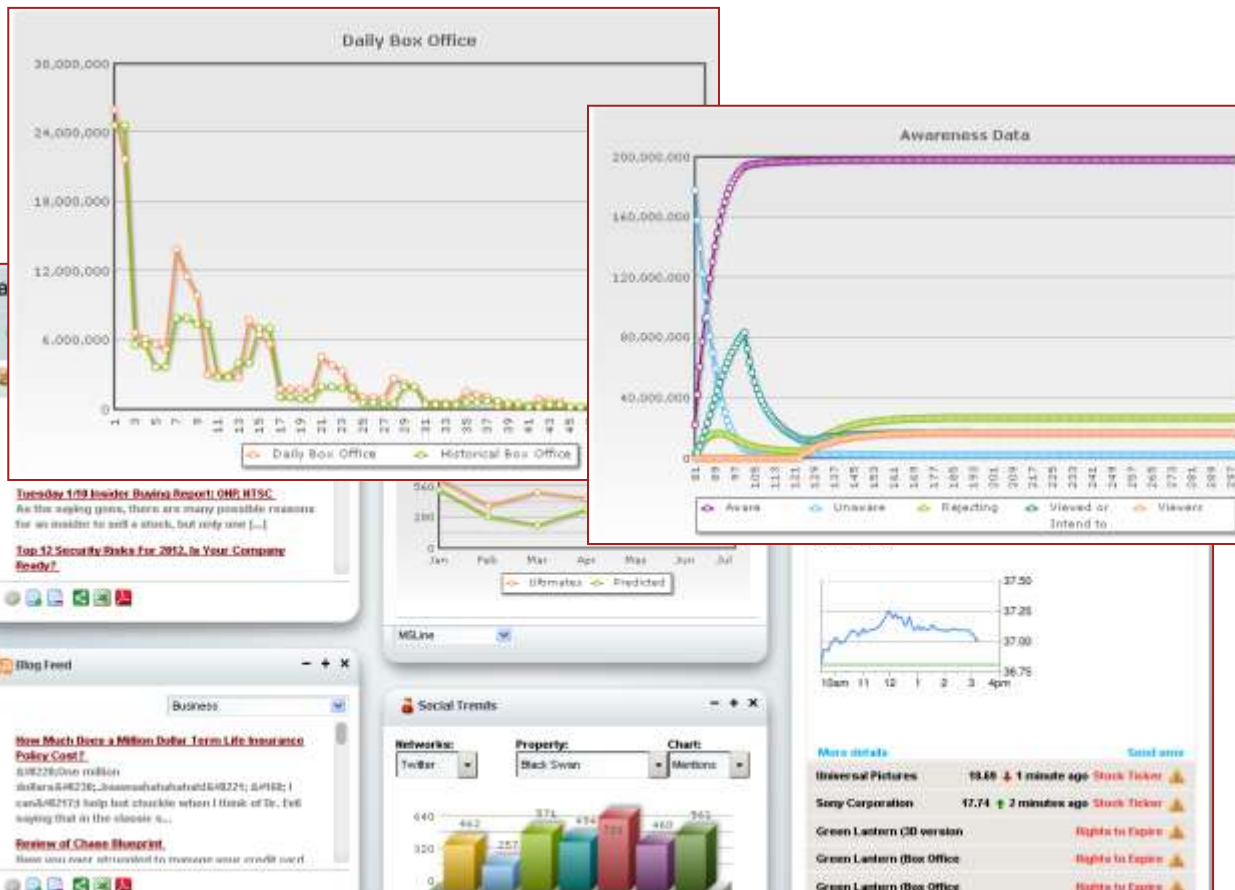
Extending CVM with dynamic analytics enhances business decisions



Dynamic analytics enhancing business decisions

Film Analytics

How do I optimize the release windowing, platforms, and distribution strategy for a film to maximize revenue across its lifecycle?



• *Do we have the right content in the right windows for the right amount of time?*

• *What kind of content is right for this new service/platform?*

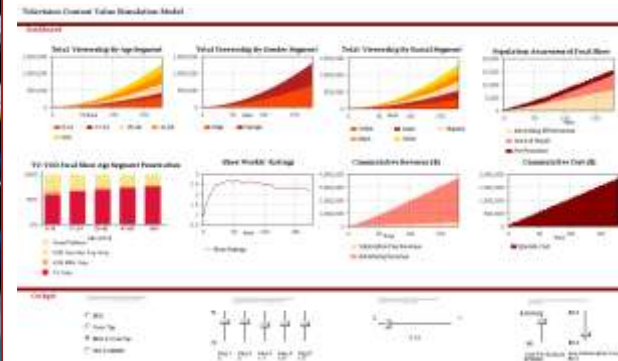
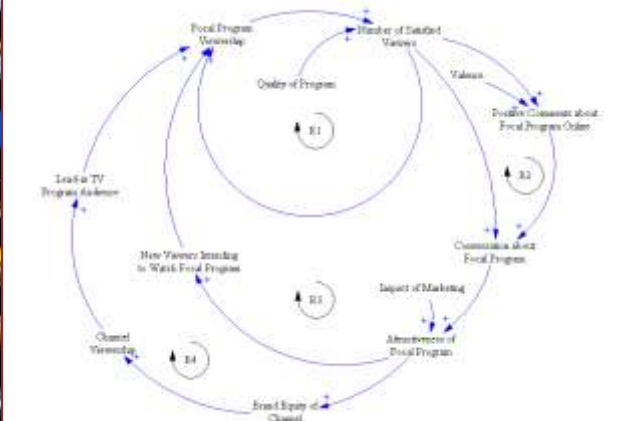
Dynamic analytics enhance business decisions

TV Content Analytics

What is the overall value (financial and brand) of a television series, and how can I improve that?

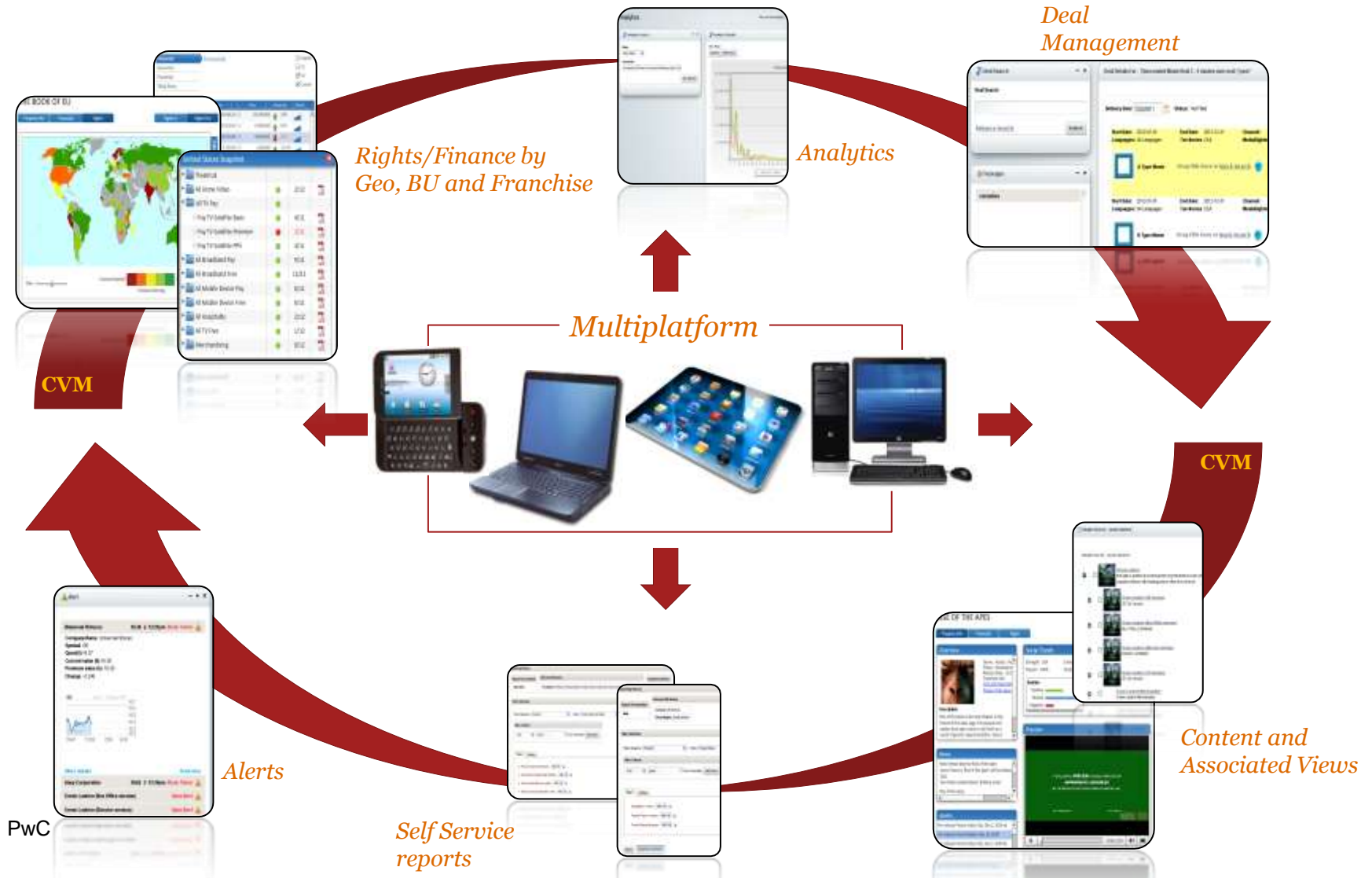
The value of content cannot be considered exclusively financial. Content's brand value should also be considered.

The analytical model allows for a combination of quantitative and qualitative valuation, taking into account both financial and brand aspects of content value.



Content Value Management (CVM)

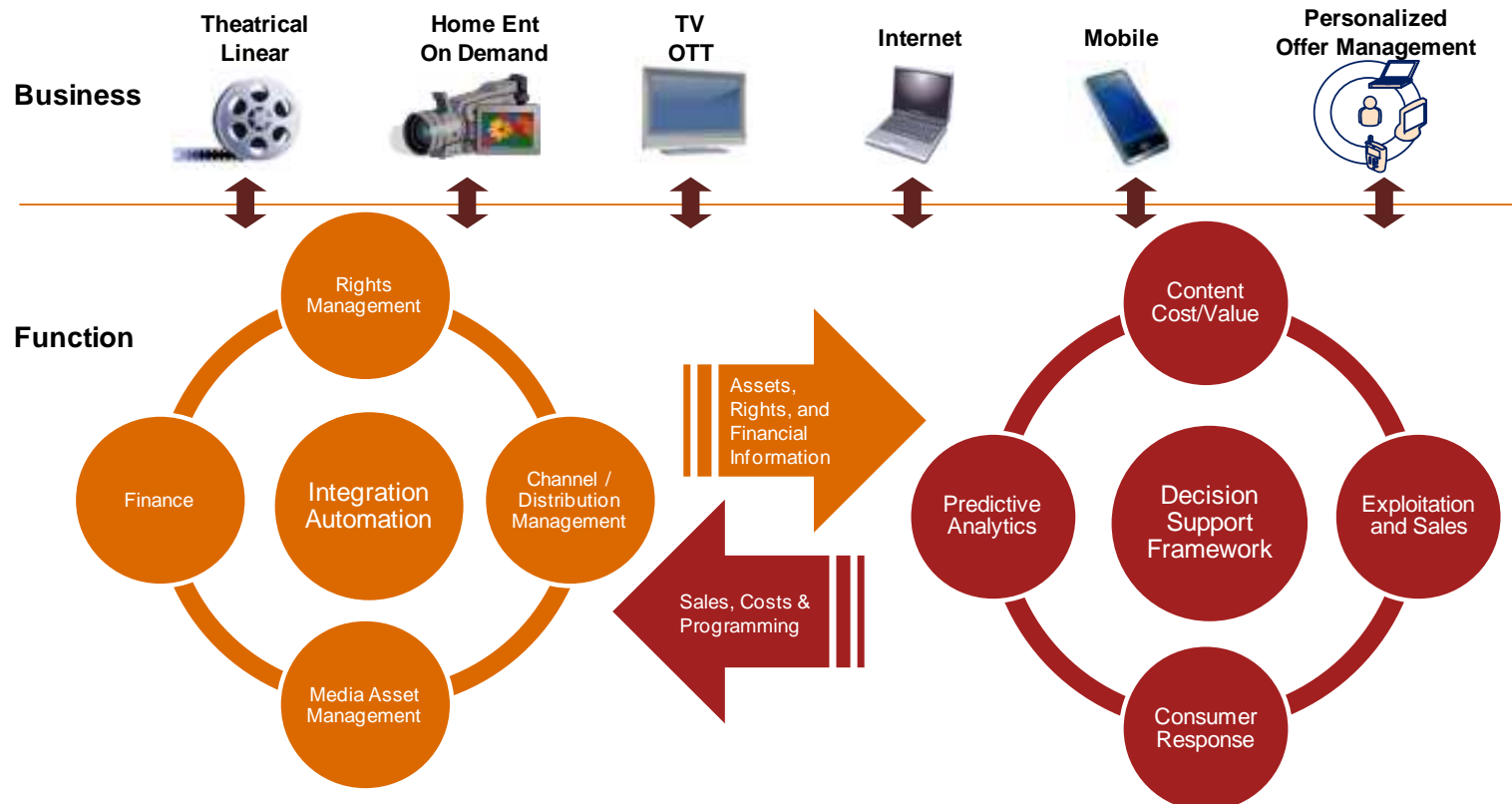
The CVM user experience presents information to the right people at the right time, in such a way that it is understandable and actionable



MAM at the center of operations and decision-support

Effective media asset, rights, and title financial management are keys to improving and maintaining the profitability of your entire content portfolio

- Decision-support in the digital content era requires the combination of knowing what media assets you have, the rights you have to monetize it, and the proper business model for the title or portfolio
- The automation and integration of these systems deliver this critical knowledge combination and drive higher operational efficiency and lower error rates
- With accurate and real time assets, rights and financial information, organizations can make the right decisions for present and future content distribution and obtain visibility on the likely impact of those decisions on revenue, costs and margin



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