Willow Bay recognized with Hedy Lamarr Award
Dean Bay of the USC Annenberg School for Communication & Journalism is the 2019 Hedy Lamarr Award recipient for Innovation in Entertainment Technology. 2020 HLA nominations are now open.

Fresh EST/VOD messaging on the way
DEG’s Marketing Committee is developing a plan to refresh industry message about trans-actional media to educate consumers on the different benefits of buying, renting and streaming.

Promotion a priority in Europe, Japan
DEG Europe started 2020 with the January relaunch of Mega Movie Week, a campaign to drive consumer engagement with digital transactions. In Japan, disc promotion continues with the 12th Japan Blu-ray Awards, set for February.

NEW DECADE. MORE DIGITAL CHOICES.
Will the 2020s be remembered as the decade that put consumers in control? P. 23
"THE TERMINATOR MOVIE WE'VE BEEN WAITING FOR"

— SCOTT MENZEL, WE LIVE ENTERTAINMENT

TERMINATOR DARK FATE

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The Terminator Movie We've Been Waiting For

— Scott Menzel, We Live Entertainment

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• Over an Hour of Bonus Content

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Multiple DEG Members are poised to launch new D2C streaming services early this year, HBO Max and Peacock among them, to join those already in market, in what has been characterized by some observers as one of the most disruptive periods in the history of television. When we look back, will the 2020s be remembered for promise unfulfilled in terms of providing a new user experience, or will it be the decade that actually put consumers in control? Page 23

CANON CLUB REPORT: DEG Builds Community for Women in Digital Entertainment

DEG’s Canon Club relaunched in 2019 with a new Advisory Board and more events and opportunities for community and career building. Chief among the new benefits is the 4 Cups of Coffee mentoring network.

“4 Cups of Coffee has been a wonderful way for mentors and mentees to meet people at different career stages in our industry and share advice. I leave every breakfast feeling invigorated both by helping a mentee and learning something new myself,” said Karin Gilford of Movies Anywhere. Page 17

DEG advocates and promotes entertainment platforms, products and distribution channels that support the movie, television, music, consumer electronics and IT industries.

The DEG can be reached at 424-248-3809, via e-mail at getinfo@degonline.org or through its website at www.degonline.org.
Happy New Year and welcome to the 2020s. I don’t know about roaring, but for our industry this new decade is bound to be landscape changing, as the consumer-driven entertainment delivery transitions started in the 2010s emerge fully formed.

Content owners of all sizes have set their sights on moving their films and TV shows closer to consumers and, in many cases, taking ownership for the first time of the consumer relationships that long were ceded to intermediaries. This massive movement has been enabled by technology, with improvements in networks and devices to deliver faster and higher-quality streaming video, but also by changes in consumer behaviors and lifestyles, which prioritize access, use and experience over ownership, and on-the-go convenience equally with in-home entertainment consumption.

While the business of entertainment creation and distribution is changing dramatically, however, some bedrock principles remain the same. At the end of the day, providing highest quality content to consumers with convenience, flexibility and affordability remains a guiding principle of our industry and it is one that DEG remains committed to helping Members achieve.

Through the D2C Alliance Council, created last year as a working group within the larger trade organization, DEG represents the global D2C industry and supports its members to help create a robust marketplace to lead the new era of content consumption. Some of DEG’s work in this new sector looks a lot like it’s successful work in older sectors, as it brings content owners, technology providers, device manufacturers and others together to work collaboratively in areas including technology and operations efficiencies, consistent consumer messaging and measurement.

As we build the D2C economy, DEG will also take advantage of the many opportunities for collaborative and industry-leading work in newer and emerging areas, including search and discovery, privacy, security and password protection. We invite you to join a D2C Alliance committee and participate in this important work.

As always, DEG will continue to support digital transactions and physical media, as these platforms will continue to be a part of consumers’ expanding universe of digital media entertainment.

A vast, new entertainment landscape is definitely taking shape, and it is building and expanding on what came before. 

Matt Strauss
Chairman, Peacock and NBCUniversal Digital Enterprises and Chair, DEG: The Digital Entertainment Group
The largest collection of movies in Dolby Vision™ and Dolby Atmos™, now available on the Apple TV app.

See. Hear. Spectacular.

Get it on Apple TV
DEG will support our D2C Alliance Council with initiatives around uniform messaging, search and discovery, password sharing, tech ops efficiencies and measurement, privacy and security.

Welcome to the New Decade. As always, the year seems to be already speeding by, the trek to and from CES not just about traveling the 230 miles across the desert from Las Vegas to Los Angeles, but more like being swept at warp speed into the business of what’s next.

At CES, Consumer Technology Association (CTA) leader Gary Shapiro used his global stage to describe the highest-level trends impacting business, including an economy shifting from the ownership of things to the sharing of things and a world evolving beyond just digital to become truly connected. These observations were not made specifically about digital entertainment, but they clearly can be applied to our business.

Media ownership and collection, while still one way that people consume their favorite movies and TV shows, is moving to the edges, while streaming – the core value of which is access, not ownership – moves to the center of the digital entertainment ecosystem. According to DEG’s annual accounting, consumers spent $15.9 billion on subscription streaming, which now accounts for 63 percent of the $25.2 billion digital home entertainment market. This reflects a 24 percent increase in streaming revenue for the year, which drove an 8.4 percent increase in digital home entertainment spending overall.

The pie is growing, which is great news, and the growth of streaming, both SVOD and AVOD, are central to DEG’s focus for 2020 on our Direct-to-Consumer Alliance (D2CA), started last year. As multiple Members are poised to launch new services early this year, HBO Max and Peacock among them, to join those already in market, DEG will support our D2C Alliance Council to tackle challenges and coordinate voluntary best practices and initiatives around uniform messaging, search and discovery, password sharing, tech ops efficiencies and measurement, as well as privacy and security. This community building and sharing of knowledge and best practices will happen in both committee and larger conference settings throughout the year.

At the same time, DEG continues to support physical and digital transactions and is working within our Marketing Committee to freshen the industry’s communication about the value of both digital transactions (EST and VOD) and 4K UHD Blu-ray. (Marketing Committee Chair Nadia Haney goes into more detail on page 42.)

I encourage all Members to participate in setting DEG objectives like these and to work together with us to increase the value to consumers of digital media in all its forms. Please contact DEG to become involved.

Amy Jo Smith
President & CEO
DEG: The Digital Entertainment Group
Volumetric stories powered by Intel.

Intel Studios immersive productions require approximately x100 times more data than a traditional movie production. The exponential amount of data is efficiently captured thanks to 2nd Gen Intel® Xeon® Platinum processors and safely stored on 2nd Gen Intel® 3D NAND SSDs.

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intel STUDIOS
Among Friends | DEG Reception @ CES

Marquee Nightclub at Cosmopolitan was abuzz with discussion about the continuing consumer transition to digital platforms, particularly D2C subscription services, during DEG's annual reception at CES, as entertainment delivery was much in the news at the show. Of course, fun was also had, as several attendees won consumer electronics from LG and Sony.

Photo captions:
1. DEG’s Amy Jo Smith (l.) with Sony prize winner Richard Siao of Sonopress and Sony’s Cheryl Goodman.
2. Bill Neighbors of Xperi – DTS introduced new corporate family members Matt Milne, Briana Currier and Tyler Winton of TiVo to the DEG reception.
4. DEG Director Tim Alessi of LG picked a TV winner.
6. Focus on Ted Schilowitz of Paramount (center l.) and Mike Dunn (center r.).
7. DEG Board Directors (l. to r.) Andrea Downing of PBS, Rick Hack of Intel and Eddie Cunningham of Universal.
8. (l. to r.) Will Manelos of StoryFit, Mike Sid of Mediamorph and Ted Garcia of RSG Media.
10. Edward Baig of USA Today represented the press corps.
11. Marquee, aglow.

Photos: Myron Hensel
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- Manage and ingest content from +435 content providers globally
- +475,000 total package deliveries to digital platforms annually
- 89 audio languages and 68 subtitle languages in inventory
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- Digital & physical product merchandising- in app/affiliate links
- Full commerce- Digital and Physical Transactions
- Immersive experiences with support for SVOD, TVOD, AVOD
- Customer/user service portal


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Fall Membership Meeting | The Future of Retail

Hosted by Intel, DEG’s Fall Membership Meeting at Skirball Center in Los Angeles complemented the Spring Membership Meeting’s focus on the Future of Entertainment by taking a big picture look at the Future of Retail. The program included discussions about consumer experience, the collection and use of data, and presentations from startup companies with innovative retail technology.

Photo captions:
1-2. In a keynote chat with Intel’s Stacey Shulman, Les Ottolenghi of Caesars Entertainment focused on the importance of consumer journey.

3. Eric Pulier of tech startup BLOCKv grabbed a virtual Coke bottle from the screen – then so did members of the audience.

4. Michael Beneville of Las Vegas’s AREA15 introduced the idea of transformational retail.

5. Discussing ways to build entertainment franchise experiences at retail: (l. to r.) John Penney, Paramount’s Hilarie Hildebrandt, Universal’s Mark Lewis, Spatial’s Greg Liberman and DreamWorks Animations’ Christina Lee Storm.

6. DEG’s Amy Jo Smith (l.) with Mary Collins and Charlie Warner of MFM, which co-hosted an Entertainment Finance Conference with DEG prior to the membership meeting.

7. Davinder Luthra of Spherex had a question for Ottolenghi

8. Tech startup Spacee’s Skip Howard (r.) demonstrated the company’s AR technology.

9. NPD Group’s Elizabeth Lafontaine dished retail trends data.


11. Rick Hack (2nd from l.) of meeting host Intel hangs out with friends.
Piecing together the entertainment experience

In our always-on digital world, consumers have become more adept at piecing together their entertainment experience. But with hundreds of over-the-top viewing options at their fingertips, consumers are also increasingly frustrated by needing multiple subscriptions to access the content they want.

How can you help consumers piece together their media puzzle?

Spring Membership Meeting | The Future of Entertainment

Dolby Laboratories’ San Francisco headquarters was the site of DEG’s Spring 2019 Membership Meeting. The meeting took place in Dolby’s state-of-the-art theater, a fitting backdrop for a discussion on the future of entertainment, headlined by Dolby Chief Scientist Dr. Poppy Crum, who spoke about the future of immersive content. Other featured speakers included esports expert Bruce Stein, of aXiomatic/Team Liquid, and a panel of videogame visionaries. The day ended with a screening of Warner Bros.’ ‘Shazam!’ in the Dolby Theater.

Photo captions:
1. Dolby’s Ron Geller welcomed members to the company’s state-of-the-art San Francisco theater.

2. Dolby’s Chris Kukshtel explained the theater’s features.

3. Full color, full sound. Awesome.

4. Warner Bros.’ Jim Wuthrich (center) takes it all in.

5. DEG’s Amy Jo Smith laid out goals for the group’s D2C Alliance.

6. aXiomatic’s Bruce Stein (r.) enlightened on the topic of esports, with Mitch Berman of Berman Strategic Advisors.

7. Dolby’s Dr. Poppy Crum explained how humans experience immersive content.

8. Crum, close up.

9. All eyes were on the giant screen.

10. Representing the video game industry as “new generation” media competition: (l. to r.) Asher Kagan of Shadow, Steven Roberts of Sony Interactive Entertainment, Cix Liv of YUR, and Luke Stepleton of 3BlackDot, in a panel discussion.
Media Entertainment
Q3 Sales Trends

The entertainment industry’s evolution is worth watching closely so you can anticipate trends and evaluate potential business opportunities and risks. Get a closer look at what’s happening with our latest insights.

Home Entertainment

Spend reached $6.3B, +11%, driven by subscription streaming and electronic sell-through.

$6.3B

$1.1B

Digital was up +3% to $1.1B, accounting for over half of transitional home entertainment.

SVOD

All of the Top 10 series on Netflix for the quarter were originals, fulfilling Netflix’s promise that originals really do drive subscriptions.

Audiences are still entering the Upside Down. All three seasons of Stranger Things were in the Top 10 for Q3 2019, indicating new audiences are discovering the franchise.

Box Office

Reached $2.4B in Q3 2019, +3.6%, driven by a stronger Top 5 performance.

$2.4B

The top-grossing title for the quarter was Disney’s The Lion King (2019) +$541M.

$541M

As U.S. entertainment consumers’ viewing habits evolve, you need a partner who can help you navigate the new landscape. We combine data, industry expertise, and prescriptive analytics to help you grow your business.

*Source: The Digital Entertainment Group/Mid-Year 2019 Home Entertainment Report, "Source: The NPD Group/Subcription Video Track"

Get more insights like this. To learn more, contact Sheryl Harkins at 312-282-8266 or email sheryl.harkins@npd.com.
Next UP | Marketing Analytics Symposium

In a February afternoon program focusing on case studies in the use of analytics and new marketing technologies, DEG Members gained insight into how MGA Entertainment launched a new toy line entirely with digital marketing (read: no TV!) and how Warner Bros. used social media to send 'Crazy Rich Asians' to big success at the box office and beyond.

Photo captions:

1. Speakers (l. to r.) Mark Bessen of StoryFit; Jim Wagner of MGA Entertainment; afternoon moderator Peter Horst of CMO, Inc.; Nadia Haney of Universal and DEG’s Marketing Committee.

2. MGA’s Wagner related how the company launched the L.O.L. Surprise! line of dolls purely with digital marketing.

3. Andrew Hotz of Warner Bros. spoke about the social media campaign for the theatrical release of ‘Crazy Rich Asians’.

4. Rex Briggs of Marketing Evolution conversed on stage with Horst about using analytics to measure marketing effectiveness.

5. In a keynote chat, Gregg Colvin of 1457 Investment Group discussed finding your customer in a multiplatform market.

6. StoryFit’s Bessen chatted with Paramount’s Dawn Mack-Holliday in detail after his presentation on narrative AI.

7. Universal’s Haney, who chairs DEG’s Marketing Committee, set the tone for the program.

8. Prior to the Marketing Analytics Symposium, DEG and the Media Financial Management Association teamed for an Entertainment Finance Conference featuring speakers Professor David Offenberg of Loyola Marymount University (l.) and Tobias Queisser of Cinelytic (r.). Also pictured: Mary Collins and Charlie Warner of MFM.

Photos: Charlie Chang
Based on the unfinished novel by Jane Austen

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Sony is a creative entertainment company with a diverse business portfolio. We harness the power of technology to connect users and creators all over the world. Together, we’re pushing the boundaries to add value to consumers’ everyday lives through our innovative products, content and services.
Canon Club Leaders Dedicated to Building Community, Opportunity

DEG is dedicated to helping cultivate a vibrant community for women in entertainment and technology, primarily through its Canon Club, which since its inception has strived to be a place where women at all levels and in all sectors of our business are welcome to share knowledge and build their business networks.

These values are embodied by Canon Club’s Chair, Robin Tarufelli of Deloitte, and Vice Chair, Meri Hassouni of Giant Interactive. Both stepped up to lead the group in mid-2019, concurrent with its relaunch with a new Advisory Board, and new activities and events for members. During the year, Canon Club started its “Four Cups of Coffee” mentoring network and offered a “Resonant Leadership” management training for mid-level executives, which was hosted by DTS.

DEG Q sat down with Tarufelli and Hassouni to talk about their vision for Canon Club.

You each are very busy executives. What inspired you to take on the additional responsibility of leading Canon Club?

RT: I am passionate about moving the needle on inclusion in our media and entertainment community. Inclusion to me is being a part of the process, knowing your opinion counts and that we’re working together toward a common goal. I believe there is a need to come together as a collective to be inspired and the Canon Club provides that.

MH: I’ve always been a believer in supporting women in our industry and helping to develop a network of women in our business. DEG’s relaunch of the Canon Club provides the ideal community to foster knowledge and collaborate with great, talented women.

What is your vision for Canon Club over the next one to three years?

RT: My vision for the Canon Club is to become THE destination for inspiration and thought leadership that supports our female leaders.

MH: In addition to increasing membership and our “Four Cups of Coffee” program, I would like to work on having more community, social and industry events.

In what ways do you plan to help Canon Club grow?

MH: I believe that by offering our members fun social get-togethers, educational workshops, and interesting lectures and talks, we can expand and grow. I would love to set up small, informal gatherings where people can share knowledge and really get to know each other—to make Canon Club a safe place to be able to ask questions and receive feedback.

What do you think are the biggest challenges women face in building careers in media and technology?

RT: In an industry that’s constantly being disrupted, keeping abreast of trends and innovations while continuously developing skillsets to meet the demands of the ever-evolving sector can certainly be daunting.

MH: In general, I don’t feel there are enough female voices contributing to the narrative. More women need to be brought into the conversation at all levels of the industry.

Do opportunities exist for women in media and technology that you think are currently underutilized?

RT: I think there is a greater opportunity to encourage women in media who are interested in STEM to pursue a career. Imagine the possibility and types of exciting jobs you can get with a STEM background.

MH: In addition to increasing membership and our “Four Cups of Coffee” program, I would like to work on having more community, social and industry events.

Have you personally had a mentor that really influenced your career?

RT: I have been fortunate to have had many mentors throughout my career, both male and female. The guidance and support I have received from all of them is invaluable and they have contributed to many choices in my life. I believe everyone can benefit from a mentor in their life.

MH: I’ve been fortunate to have worked for Jeff Stabenua for almost 20 years in three of his different companies and having such longevity and support from Jeff in this field has created numerous opportunities to grow and expand my career.

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New Benefit: “Four Cups of Coffee”

Canon Club this year kicked off the “4 Cups of Coffee” mentoring program, matching female executives with an Advisory Board member or another senior executive Mentor for a cup of coffee and career conversation as often as once per quarter. Mentees may meet with up to four mentors each year.

“Four Cups” kicked off with reception hosted by Deloitte in June at Sony Pictures, where guests mingled with Advisors and Mentors and were invited to sign up for the one-on-one meetings throughout the year.

Canon Club will open the program to new Mentors and Mentees in the spring. For more information, check www.degonline.com/canon-club/.

Welcoming guests at the June kick-off reception (l. to r.): Canon Club Co-Chair Meri Hassouni (Giant Interactive), Amy Jo Smith (DEG), Chair Robin Tarufelli (Deloitte), Advisor Cheryl Goodman (Sony Electronics).

Vice Chair Meri Hassouni is VP Business Development at Giant Interactive, where she puts to work her passion for client relations and media technology. Since the launch of Giant Interactive, she has overseen client services and cultivated partnerships for Giant’s digital servicing and authoring studio. She also supports Giant Pictures as a digital distributor elevating the filmmaker’s experience.

Darcy Antonellis is Division President of Amdocs Media, a division of Amdocs, and CEO of Vubiquity Inc., which delivers premium content and user experiences across a host of digital, consumer-facing video services globally.

Sofia Chang is President, Warner Media Distribution, where she oversees distribution for all Turner channels, HBO, Cinemax, and HBO Max. Previously, Chang was EVP of Global Digital Distribution for HBO, where she became a recognized leader of well-established, premium brands in highly competitive markets through her oversight of all aspects of the company’s global physical and digital home entertainment business, including transactional, subscription and content licensing models.

Andrea Downing is Co-President of PBS Distribution (PBSd), a leading global media distributor for the public television community. A calculated risk-taker with deep industry knowledge, Downing’s vision brought PBSd’s initial focus on physical goods to a multichannel, multi-format distribution unit, creating significant growth in the digital distribution divisions.

Advisor Darcy Antonellis (l., Vubiquity) and Mentor Kejo Swingler (HBO). Antonellis called the 4 Cups program “a terrific add to the Canon Club roster with the mentors and mentees sharing experiences and perspectives...a great way to pay it forward!”

Mentor Rachel Crang of Paramount (l.), pictured with her Mentee Corina Jimenez of Disney, said “The DEG’s 4 Cups of Coffee has been a great opportunity to get to know some inspiring women whose paths I may not have crossed with otherwise. If you are open to always continuing to learn and look at things from a fresh perspective, mentoring benefits both the mentor and mentee.”
New Benefit: DTS Resonant Leadership Training

Sponsor Xperi-DTS in the fall invited a limited number of Canon Club members to participate in a one-day “Resonant Leadership” management training program, with the goal of preparing more junior-to-midlevel managers for leadership positions. Women from a wide swath of DEG member companies spent the day learning different leadership styles and had the opportunity to work with a peer to workshop specific situations. The response from the training has been overwhelmingly positive, with numerous participants reporting that they have put the skills learned into practice.

In 2020, the Canon Club Advisory Board is committed to offering career development tracks for female executives of all levels. For more information, check www.degonline.com/canon-club/.

(l. to r.) Aerin Schlumberger (Vubiquity) with training facilitators Kath Gelineau (Xperi-DTS) and Rose Drummond (Sea Change Partners, for Xperi-DTS).

Relaxing at the end of a Resonant day (l. to r.): Beth Tateel-Pucci (Universal), Jennifer Scarry (Paramount), Megan Blakeley (Universal), Naivasha Dean (Redbox), Megan Zamyatin (PBS), Loren Nielsen (Xperi-DTS).

Michele Edelman is Head of Growth at Premiere Digital, responsible for the global provider of distribution technology solutions’ current and future market positioning. An industry executive with extensive marketing and sales experience at companies including Vubiquity, she has created dynamic campaigns for some of the largest entertainment studios including Disney, ESPN, MTV Networks and Warner Bros.

Karin Gilford is GM of Movies Anywhere, where she leads an independent, dedicated cross-functional team of product, technology, marketing and other professionals. She oversees product development, business strategy, marketing and long-term growth of all aspects of the Movies Anywhere brand and is the key liaison between the participating studios, responsible for representing their independent interests.

Cheryl Goodman is Head of Corporate Communications for Sony Electronics, working closely with the Sony Electronics team to develop the strategy and execution of all internal and external communications to inform, excite and interpret the Sony brand to key stakeholders throughout the U.S. and Canada.

Nadia Haney is VP Global Marketing, Emerging Technology for Universal Pictures Home Entertainment, where she has a track record of meaningful business results delivered while shaping industry standards. She oversees business development, integration and strategic marketing of existing, new and emerging entertainment technology and formats for the division on a worldwide basis.

Dametra Johnson-Marletti is GM for Digital Category Management in the Stores organization within Microsoft’s Mobile Communications Business Group, with responsibility for all storefronts in Microsoft’s $8 billion-plus digital stores business. She works with external content partners in all categories to optimize both customer experience and financial opportunities for Microsoft and its partners.

H. Loren Nielsen is VP Content Relations & Strategy for DTS Inc., where she leads the effort, in collaboration with content owners, to enable a flow of top-tier movies that utilize DTS:X sound, enabling more people to experience immersive sound technology in theatre, homes and mobile devices worldwide.

Can on Club Mentors

Rachel Crang is VP Worldwide Technical Operations, Product Production at Paramount Pictures. She manages the logistical planning and execution of all aspects of production for disc and e-copy product for Paramount and Viacom partners.

Heathyr Jozel-Garcia, a veteran of television marketing and production, is Executive Director, Television Post Production at ABC Studios, which she rejoined last year from Lionsgate Television.

Beth Kearns currently serves as a Venture Partner with Touchdown Ventures and co-teaches Corporate Entrepreneurship at her alma mater, UCLA Anderson School of Management. Previously, she was EVP Operations Strategy at 20th Century Fox Film.

Kejo Swingler is Director in WarnerMedia’s Technology, Content Operations department, working on new service launches, global technology operations, foreign content aggregation, digital media production and global distribution.

Kenneth Williams is Executive Director and CEO of the Entertainment Technology Center at USC, a technology think tank that brings together top entertainment, technology and CE companies to understand and collaborate on the impact of new technology on entertainment.

Samara Winterfeld is VP Product Management for Home Solutions and Pro Content at DTS, where she and her team are responsible for developing and sustaining end-to-end ecosystems that create and deliver DTS content for cinema and home entertainment.
Inspired by Hedy Lamarr, who was an accomplished inventor in addition to being one of the most well-known actresses of her time, DEG’s Hedy Lamarr Awards are intended to recognize and inspire pioneering work by the multi-faceted female leaders in our entertainment and technology industries today. The 2019 Hedy Lamarr Awards were presented November 12, 2019 to Willow Bay, Dean of the USC Annenberg School for Communication & Journalism, and USC student Maya Tribbitt. The awards reception and a financial award to Tribbitt were sponsored by Sony Electronics and the Annenberg Foundation.

In a career parallel with Lamarr, Bay is is known widely for her work in front of the camera, as a reporter and anchor for outlets including ABC News’ Good Morning America, NBC’s Today Show and CNN’s Moneyline. She is, however, also a powerful technology innovator in the field of digital communications. As a senior editor and strategic advisor for pioneering online news site The Huffington Post, she managed growth initiatives including the launch of more than a dozen news, business and lifestyle content verticals. At USC, she has launched the USC Annenberg Media Center, introduced the school’s new Bachelor of Arts in Journalism program, welcomed the first cohort of the school’s nine-month Master of Science in Journalism program, forged partnerships with key media industry partners, and created new curriculum—all with the goal of ensuring that current and future communicators are fluent across both traditional and digital platforms.

Maya Tribbitt is an Honors student at USC, studying international relations, communication and journalism, and cinematic arts. She expects to graduate in 2021 with bachelor’s degrees in international relations and journalism.

The fourth annual Hedy Lamarr Awards will be presented in 2020. Nomination forms and scholarship applications are available now on the DEG web site (www.degonline.org).

Cassidy Pearsall, on the impact of winning the Hedy Lamarr Award

“Thank you for everything you did for me last year, it really helped kick my professional life into gear. Even prior to graduating, I have had to turn down more work than I could accept, and I am fully employed in a job that I really am loving at disguise NYC. We are a media server company that offers a full production pipeline for video teams on the some of the biggest concert tours/theatre shows/VR experiences in development, and I am getting calls daily from some of the most prominent video designers in the industry. I have been meeting lots of amazing people who have taken me under their wings, and I owe a lot of my momentum to the DEG recognizing me last year.”

HEDY LAMARR AWARD “HONOR ROLL”

Award for Innovation in Entertainment Technology

2019
Willow Bay,
Dean, USC Annenberg School for Communication & Journalism

2018
Nonny de la Peña,
CEO, Emblematic Group

2017
Geena Davis,
Founder & Chair,
Geena Davis Institute on Gender in Media

Achievement Award for Emerging Leaders in Entertainment Technology

2019
Maya Tribbitt,
USC

2018
Cassidy Pearsall,
Carnegie Mellon University

2017
Johanna Baumann,
University of Michigan
TRANSFORMING THE ENTERTAINMENT INDUSTRY THROUGH DATA & CONSUMER INSIGHTS

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Will the 2020s be remembered as the decade that put consumers in control?

Multiple DEG Members are poised to launch new D2C streaming services early this year, HBO Max and Peacock among them, to join those already in market, in what has been characterized by some observers as one of the most disruptive periods in the history of television. When we look back, will the 2020s be remembered for promise unfulfilled in terms of providing a new user experience, or will it be the decade that actually put consumers in control?
D2C Is a Decades-Long Disruption

TDG’s Michael Greeson on toggling, rebundling and what comes next

Michael Greeson is President and Co-Founder of The Diffusion Group, the highly regarded media research firm whose work explores the intersection between consumer technology and media behavior. Just after the launches of Disney+ and Apple TV+, but before the bows of HBO Max and Peacock, DEG talked to Greeson about the D2C transition.

The current D2C transition is often characterized as one of the most disruptive periods in the history of television. Do you agree with that?

MG: I fully agree, as every link in the home entertainment value chain is enduring disruption. But it’s not as if this disruption just got cranked up in 2019. This process began more than decade ago, shortly after Netflix began streaming. Unfortunately, it has taken a decade for Hollywood to grasp the full implications of that seemingly simple tech shift.

For the first five years of this period, the disruption was primarily technology-driven, with ongoing improvements in networks and devices to deliver faster broadband and higher-quality streaming video. In the last five years, these innovations disrupted established business models, and that’s where most of the action is occurring now and will occur in the next decade.

How are consumers driving the transition from linear TV to streaming (if they are)?

MG: For one, they have more choice when it comes to high-quality TV content than ever before. Moreover, they are increasingly choosing on-demand streaming services as opposed to live linear TV. TDG found that US adult broadband users spend about half of their TV screen time watching streaming video. Among younger viewers, it’s even more.

Ten years ago, most all viewers turned first to live broadcasts. Today, among those with a home broadband connection, about half turn first to live linear while 45% turn first to a streaming source (SVOD, TVOD, or AVOD).

Why the shift? As the reach and quality of broadband connections expanded, so too did the number of players entering the streaming video space. In order to differentiate, simply regurgitating prior shows was no longer enough. High-quality made-for-streaming originals ramped up and traditional studios realized that, if that’s where the eyeballs were going, that’s where their best content had to go, which meant taking control of their extensive libraries to launch their own DTC services.

It sounds like quality of content is a primary factor in consumers’ move to D2C. What are other key reasons people are making the shift?

MG: When long-term users are asked why they still subscribe to Netflix, “great price” tops the list, with quality of content ranking second. Put simply, great price plus great content equals high value, and value is largely responsible for driving consumers into the arms of streaming services—especially when compared with pay-TV services.

However, every time Netflix increases its prices, consumers reconsider the value calculus. TDG’s research found that, of those that had dropped Netflix in the last five years, most of them quit in the last 12 months. Why? “Price increases” came to top, followed by increased use of competing streaming services and boredom with the content.

With big-guns like Disney and WarnerMedia moving into the DTC space, no doubt consumers will have access to even more high-quality streaming content. However, because of the tribalism inherent in launching branded DTC services (a phenomenon TDG first noted in Q1 ’18), the consumer experience will be fragmented among an ever-growing array of services. At some point, then, the cost of SVOD services will become a much more important issue in consumer decisions.

Research shows that consumers think there are quickly getting to be too many streaming services, and that they collectively are too expensive. What do you think this means for established players, new services, and those that haven’t launched yet?

MG: Recent TDG research found that two-thirds of SVOD subscribers are comfortable with the number of services to which they subscribe and aren’t looking to add or cancel a service. Only 10% said they were paying for too many services and needed to cancel one or more. So, the idea that consumers are “fatigued” by the number of SVOD apps they are using is incorrect.

In the same survey where we assessed perceptions of app-count fatigue, we asked adult broadband users of their interest in what is now Disney+. Approximately 65% said they would add Disney+, while 35% said they wouldn’t add it. Astonishingly, nearly half of OTT streamers wanted Disney+ to vary degrees interested in signing up for Disney+, even though most of them had just a minute earlier said they weren’t looking to add or cancel an SVOD service.

When asked of the impact of adding Disney+ to their SVOD services, most said they would simply add it to their current collection. Of those who said they would cancel another app, the majority said they’d drop Hulu, not Netflix. Netflix, in other words, is largely viewed as a bedrock service.

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What Consumers Want

TV Time and United Talent Agency conducted a joint consumer media study to assess how consumers feel about the new streaming landscape. The survey conducted in September prior to the launches of Disney+ and Apple TV+, drew on TV Time’s global community of more than 12 million users of its TV tracking platform. U.S. results (below) were balanced by gender and age (13-54) of the general population.

The study also was conducted in three Disney+ international launch markets: Australia, Canada and the Netherlands. The results were similar to the U.S., with library content carrying more importance to respondents than originals and there being generally high interest in the Marvel franchise.

Library Content Is Key

- Library Content: 90%
- Original Content: 68%

Source: TV Time; % of consumers who responded “Important” or “Very Important” when asked, “In general, how important is the availability of library/original content when considering a streaming service?”

Franchises Drive Interest in Disney+

How interested are you in the following being part of the Disney+ service?

- Marvel: Avengers - Infinity War
- Pixar: Toy Story 3
- Star Wars: The Mandalorian

All respondents: 77% Marvel, 88% Pixar, 81% Classic Disney, 85% Disney+ Originals
Those “likely” or “very likely” to subscribe: 71% Marvel, 71% Pixar, 61% Classic Disney, 55% Disney+ Originals

Source: TV Time
Max Interest in HBO

How interested are you in the following being part of the HBO Max service?

![HBO TV: Game of Thrones](image)

<table>
<thead>
<tr>
<th>SHOW TITLE</th>
<th>NETWORK / SERVICE</th>
<th>RELEASE DATE</th>
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<tr>
<td>Star Trek: Picard</td>
<td>CBS All Access</td>
<td>1/23/2020</td>
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<td>9-1-1: Lone Star</td>
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<td>Disney+</td>
<td>8/5/2020</td>
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<td>Marvel's Loki</td>
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<td>Marvel's What If...</td>
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</table>

Source: TV Time; * as of January 17, 2020

![Warner Legacy Shows: Friends](image)

![Star Trek: Picard](image)
With the streaming wars upon us, the dream of a-la-carte TV is becoming a reality. But this newfound freedom, which allows viewers to select only the channels they want, comes with drawbacks. Indeed, utopia could be characterized as an unrealizable ideal. And that truth will in turn become understood in the world of streaming video. Yet in pursuit of the ideal, video distributors will be presented with numerous opportunities to shine above competitors as the changing landscape offers a chance to build a best-in-class TV experience. The timeline to do so is compressed, in that viewers will determine their future habits in the coming years. Content, (re)bundleing, and user interface (UI) will define success.

From no choice to option overload
Merely ten years ago, options for watching TV were largely limited to cable or satellite TV providers. Mobile video was, at best, nascent and streaming had just surfaced. Cable TV delivered a high quality of service and value through channel bundling that remains a mainstay for a majority of today’s consumers. But required channel bundling, incremental UI enhancements and rising cable bills drove an appetite for innovation. As such, the advent of streaming was enabled by consumer readiness, a proliferation of in-home broadband internet, mobile device ubiquity and 4G networks. As viewers, we’ve found ourselves with more choices than ever before. There’s EST, SVOD, DTC, AVOD, MVPDs, vMVPDs, and a revival of OTA broadcasts providing an overwhelming amount of options. This is where the need to solve for the challenges of a fragmented and disparate distribution environment offers an opportunity to shine above the competition.

Content is king
From the idea of a TV utopia, with the ability to pay for only the content you want, the prowess of a Machiavellian world surfaced. Recent mergers and acquisitions focused on developing vertically integrated, content heavy media enterprises. Just consider – Disney owns BAMPtech’s streaming video infrastructure, Disney, FOX and Pixar studios, ABC and ESPN networks, as well as its own distribution through Disney+ and Hulu. It is these media, and now distribution, conglomerates such as Disney, WarnerMedia, ViacomCBS, and NBC Universal, that are looking to capitalize on the streaming environment pioneered by Netflix. From a viewer perspective there hasn’t been a point-in-time with a greater ability to pay for only desired content. Indeed, around one-quarter (23 percent) of direct-to-consumer video channel users cite that as a reason they subscribed. Further, the uptake of Disney+ suggests a strong market for future services like Peacock, HBO Max and Quibi. Content that is delivered in a consumer-friendly manner is truly king.

The “Great Re-bundling”
A-la-carte brings with it a new set of consumer frustrations. Consumers now have multiple video provider bills, an array of disparate UIs to navigate and mounting costs to add streaming services in order to get access to each media company’s content. We foresee a rebundling, yet one that will show advancements learned from the follies of the past. The distributors, be it Amazon channels, Roku, or Disney, have already begun re-bundling, offering a more unified UI and single billing relationship. Will this simply enable different distributors, ones that in turn construct their own walled gardens? Will this result in the loss of the utopian TV dream?

Search, discovery and ease of use will reign supreme
Consumers now have more control than ever. They choose where to focus their viewing attention, placing a large burden on video distributors to solve for the new challenge, one of overwhelming choice. Strong programming, ubiquitous access, intuitive UI, and streamlined billing will be among the facets that drive viewer’s decisions. To that end, it will be of tantamount importance to enable best in class content discovery features and determine how to re-capture a cable TV staple, destination viewing, in order to maximize engagement and minimize churn. One thing is clear, the future of TV will remain fragmented for years to come and with that consumers will continue to have more control than ever.

John Buffone is Executive Director, Industry Analyst, for The NPD Group’s Connected Intelligence practice. With over 20 years of experience in the consumer research and entertainment industries, he has advised many of the largest media and consumer technology brands in the industry.
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“Streaming has put the microscope on linear pay-TV and the value of it in a way that nothing else had ever done before.”

What can the streaming services do to cultivate this more elastic demand?

MG: As TDG has reiterated for the last two years, “subscription hopping” or “app toggling” would become an increasingly common behavior among OTT users—that is, signing up for an app for short period of time (a month or less), binging all the shows you care about, then cancelling that app and adding another. While the possibility of this behavior has always existed, it’s only now starting to make sense to consumers.

We noted in late 2017 that new “Pay-TV 3.0 operators” would emerge to address this behavior; to provide a single gateway within which consumers could buy and cancel apps at will. Amazon Prime Channels and the Roku Channel Store are early favorites to be the first true Pay-TV 3.0 operators, as they’ve built an ecosystem in which the model could be executed.

So, what is this Pay-TV 3.0 model?

MG: An a la carte bundle, if you will, but with much greater flexibility than pay-TV bundles. Imagine a bundle comprised of streaming channels from three tiers. For $50 a month, you get one premium app (say, Netflix, HBO Max, or other apps currently priced at $13/month or higher); three mid-tier apps (say, Hulu, Disney+, or other apps priced a la carte at $5-$10/month); and five low-tier apps (say, Peacock, Curiosity Stream, and others priced at $5 or less per month). But here’s the kicker: you can switch between apps of the same tier at will.

It seems fantastical now, and will require nuanced negotiations with content owners as well as possibly an annual contract, but we believe this is where we are headed in the next 3-5 years. And Amazon, Roku, and Apple will be driving it.

Hulu is already encouraging this behavior, though within a Disney-only bundle.

Disney’s launch of Disney+ struck some people as a stark contrast with the way a tech company would launch and run a major new service. (Such as undertaking a broad launch of the service without a beta test and discounting the role of data in the creative process).

Do you see fundamental differences in the way media companies and tech companies are approaching streaming services?

MG: Well, they are definitely operations built for different ends. Technology companies are primarily run by computer engineers with a goal to create and perfect technologies. Media companies, on the other hand, are primarily run by creatives and producers, and built to create compelling media.

While these are different ends, they are not mutually exclusive. We now use the phrase “tech-media company” to refer to entities like Amazon, Facebook, and Apple that were born of Silicon Valley but have long sought to work their way into Hollywood. Note that the term “media-tech company” is rarely used, and it’s rare that creative-driven studios venture into native technology efforts, preferring instead to acquire tech companies as needed to improve media delivery.

Disney, regardless of acquisitions to build up its technology portfolio, is still primarily a creative-driven company.

Netflix, while undoubtedly producing great content, cedes creative choices to data engineers. If an expensive star-driven title doesn’t live up to viewing expectations, it is cancelled at the speed of light (or rather, speed of data), despite the protests of creatives vested in story line or social statement. Conversely, a studio like Disney might hang on to a show much longer than an algorithm because of the faith and confidence of creatives who see the value of show as more than just the sum of data.

As to positioning…. With a tech-media firm like Apple, Apple TV+ is first, The Morning Show second. Disney, on the other hand, is all too happy to push The Mandalorian to the front, with Disney+, of course, featured prominently. As to who’s most successful, it’s hard to argue with either. Both Disney and Netflix are killing it, even as their brethren struggle.

As the content landscape becomes more fragmented, and high-quality content is distributed exclusively through an affiliated service, what must be done from a marketing standpoint to help consumers make the connection between show titles and service brand?

MG: Seek differentiation in original content. This is where traditional studios like Disney, WarnerMedia, and Peacock have undeniable advantages. Netflix should be viewed in this light, as well. It has successfully built a deep library of originals with more on the way.

Mine your user base. For companies like Apple, without a rich library of original content, receiving a few Hollywood awards in 2020 would be wonderful. However, it is unlikely to draw more than few greenfield consumers into its rank. Then again, the objective is to convert as many Apple users as possible into paying Apple TV+ subscribers, thus the one-year-free offer. That’s a great base to start with, but if Apple could retain even five to 10 percent of its global users as paying subscribers, the service does indeed have a chance.

Seek differentiation in value. Achieving the right balance of content and price is required, but operators should also be hyper-aware of shifting pricing dynamics, which is pointing downward.

Look to new models on the horizon. Pay-TV 3.0 may seem futuristic, but it will arrive in the next 3-5 years, albeit in a limited form. Longer term, it is all but certain to be a favored model.
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DEGE and BASE Support Digital Transactions with Mega Movie Week

DEGE and the British Association for Screen Entertainment (BASE) started 2020 with the January 20 relaunch of Mega Movie Week, a category-wide campaign to drive consumer education and engagement with the growing digital transactional market.

During Mega Movie Week BASE and DEGE members drive an educational message through out of home, print, broadcast and cinema advertising as well as programmatic and mobile video about the simplicity of digital transaction and the flexibility it offers consumers.

Digital retailers supporting the initiative include Amazon Prime Video, the Apple TV app, BT TV Store, CHILI, the Google Play Store, Microsoft Store, PlayStation Store, Rakuten TV, Sky Store and Talk Talk TV, with a curated list of latest and greatest digital titles on offer during the week to encourage longer term engagement.

“As we move into a new decade, BASE continues its focus on driving ownership across the category. It’s great to see the plans to drive digital transaction in 2020 – kick-started with the return of Mega Movie Week in January – supporting long-term strategic goals and aligning with the continued focus on physical media as evidenced through Project 2020 and on-going development of catalogue marketing activity,” said Kevin Dersley, Co-Vice Chair at BASE and Managing Director of Elevation Sales.

Studios Partner with Asda to Remerchandise Physical Media

Project 2020 focus is on adding excitement and ease of shopping to the grocery aisle

DEGE affiliate BASE have been anticipating 2020 since 2017. That’s when BASE first created a cross-industry group, called Project 2020, charged with the goal of reinvigorating physical home entertainment sales in the supermarket channel through category reconfiguration and newly innovative merchandising.

Working with mass merchant Asda, Project 2020 in the third quarter of 2019 expanded a one-store test to a 10-store trial across large (nine home entertainment bays) and small format (five bays) Asda stores in a broad swath of the U.K. Among the key changes: Re-ordering the aisle and making it a more enticing experience for consumers to shop.

“Home entertainment has been a significant part of our general merchandise customer offer in Asda for many years and continues to be an important driver of sales for the business. However, over the past couple of years, we feel the offer in store has lost a little bit of theatre and has become quite difficult to shop for customers,” Andrew Thompson, Senior Buying Manager, Entertainment for retailer Asda said in explaining the retailer’s motivation to help lead Project 2020.

Changes included the addition of lightboxes to create a more cinematic feel, with coming soon posters encouraging organizers by genre is key to making the Asda aisles more easily shoppable.
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repeat visits to the aisle. Other merchandising changes include turning DVD and Blu-ray boxes face out, organizing titles by genre rather than price, stocking Blu-ray in a central position to aid visibility, lowering the height of shelves to allow easier access, and stocking food items likely to be consumed while watching movies or TV within the department. SKU count was also reduced by 20 percent to aid customer browsing.

“We are really proud of the initial outcomes of our trial in the [initial] Morley store, with the biggest change being a refreshed and simplified genre-based customer offer that is easier to shop,” Thompson said. “We have introduced theatre through the use of light boxes, a new suite of POS and appropriate confectionary products at the entrance to the aisle. Initial sales are encouraging, with customer and colleague feedback being really favorable.”

Unlocking “joy and emotion” inside disc boxes

Project 2020 is the product of a cross-studio collaboration comprising 20th Century Fox, Universal Pictures, Walt Disney Studios, Warner Bros., Sony Pictures, Elevation Sales, Spirit Entertainment, and BBC Studios. The group enlisted experience/design agency Hidden Gorilla, which had previously worked with other retailers, banks and even airport security, to conduct consumer research, identify what needed to be done and help it implement the changes.

“The gap between the joy and emotion locked up inside the DVD boxes and the sea of sameness that grocery shoppers faced pre-trial was a huge motivating challenge for all of us,” said Graham Bishop, Founder of Hidden Gorilla. “The way the individual BASE member companies put aside their commercial competitiveness for the good of the project was fantastic, leading to a core team operating much more effectively than would have been the case if we’d been dealing with single companies.”

Kevin Dersley, Managing Director, Elevation Sales and BASE Vice Chair, agreed that the collaboration between studios is a primary reason the project has been as successful as it has. “This is by far the best example I’ve experienced of a cross-studio group of execs working collaboratively with the sole focus of doing what’s right for the category and putting individual company interest to one side – with a clear back-drop that a vibrant, sustainable physical retail universe in 2020 and beyond is in everyone’s interests,” Dersley said.

The Project 2020 group was created to advance the dual mission of championing growth and delivering sustainability across the physical disc market, said BASE CEO Liz Bales. In the 18 months since the project began to take shape, she noted, goals grew progressively larger, ranging for instance, from simply using lanyards to engage store staff and customers, then building to include the installation of permanent metal fixtures in some Sainsbury’s stores, before expanding to the full category reconfiguration at Asda.

“The importance of this project shouldn’t be underplayed – it not only demonstrates distribution’s commitment to the physical category, it also stands as testament to the phenomenal engagement from the entertainment and corporate teams at Asda,” Bales said. “There’s still a way to go but what is emerging is an exciting shared vision of the future of the category at grocery.”
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Product Promotion a Priority for DEG Japan

Actress Mayu Hotta featured in consumer booklet, as awards ambassador

DEG Japan’s Physical Media and PR Divisions were busy promoting the Blu-ray Disc format in 2019, an effort that continues into 2020 with the approach of the 12th Japan Blu-ray Awards, scheduled for February 19, 2020 in Tokyo.

Popular actress Mayu Hotta was successfully booked by the Physical Media Division’s Blu-ray Award / Co-promotion Group as 2019 DEG Ambassador. In that role, she was featured in a promotional booklet created to demonstrate to consumers the features and entertainment value of Blu-ray Disc and 4K Ultra HD Blu-ray Disc. She also will appear at the Japan Blu-ray Awards in February to maximize media exposure for that event.

The Blu-ray booklet was created for the first time with Japan Video Software Association (JVA). The booklet announced both DEG activities and JVA’s Video Day Promotion; 200,000 copies were distributed.

Working cooperatively with JVA was a top priority for DEG Japan in 2019, as the joint effort resulted in cost savings, as well as information sharing between the two organizations with productive discussions through monthly meetings.

In addition, DEG Japan’s 4K UHD Promotion / Consumer Education Group has created and distributed more than 1,300 UHD demo discs to support in-store promotions. Upcoming plans are to strengthen 4K UHD Blu-ray promotion on store shelves, to promote 4K UHD Blu-ray as part of the Japan Blu-ray Award, and to educate consumers with a Blu-ray screening event tied to the Award.

PR Division plans awards

The Japan Blu-ray Awards recognizes Blu-ray Disc titles marketed during 2019 that maximize the advantages of Blu-ray Disc technology.

The awards screening committee is headed by audio-visual critics, chief editors from movie, video, music and animation industrial magazines, and representatives from hardware manufacturers affiliated with DEG Japan.

Screenings were held to select each category’s best Blu-ray titles and a Grand Prize screening with those titles is planned for the end of January 2020.

The 12th Japan Blu-ray Awards ceremony will be held to present the most outstanding Blu-ray titles released in 2019 as well as the Grand Prize. As the 12th Japan Blu-ray Awards ambassador, actress Hotta will attend the ceremony to present a special trophy to the winner of the Grand Prize at the ceremony.

DEG Japan is led by chairman Shiro Kawai of FOX/Disney. The group consists of 28 companies (21 content providers/studios, three hardware manufacturers, and four supporting companies). Within DEG Japan, there is a PR Division, a Physical Media Division, and a Digital Distribution Division, which are smaller groups formed by members focusing on their respective initiatives.
DEG Welcomes New Members

DEG recently added seven new member companies representing the full spectrum of digital media creation and distribution. DEG President & CEO Amy Jo Smith welcomed all of the new companies to DEG. “Each of these new members is a market leader and digital innovator, and each represents our industry’s move closer to the consumer,” she said.

Amazon Studios delivers bold and innovative series and films from top tier and up-and-coming creators to customers in over 200 countries and territories, primarily through the Amazon Prime Video streaming service. With plans to release 30 movies annually and with 40 original TV shows already in distribution, Amazon Studios has won Emmys, Golden Globes, and Oscar awards for its content. It is a leading driver of growth in Amazon Prime memberships in recent years.

AMC Theatres is part of the largest multiplex operator in the world and one of the first U.S. exhibitors to operate an on-demand division. Its transactional service, AMC Theatres on Demand, offers about 2,000 films for digital sale or rent after their theatrical runs. Disney, Warner Bros., Universal, Sony and Paramount have made deals with AMC for catalog and new-release movies to be available through the new service, which differentiates itself from other digital retailers by focusing solely on movies.

IYUNO Media Group is a digital production technology leader that provides global localization and media content distribution services through 40 facilities in 30 countries. IYUNO enables worldwide dubbing and subtitling capabilities for streaming, film, and television, using AI and machine learning to accommodate client projects and lead times. The company’s accomplishments include more than 6 million dubbed and 18 million subtitled minutes in 82 languages.

OWNZONES Entertainment Technologies is a leading cloud-based video supply chain company that empowers content creators to reach their consumers on a global scale. OWNZONES’ suite of SaaS solutions, including OWNZONES Connect, is built entirely in the cloud and incorporates cutting-edge video supply chain workflows and formats to make the vision for a studio in the cloud a reality. OWNZONES’ platform is built by a team of experts with decades of combined experience at companies such as Amazon, HBO, Netflix and Microsoft.

ROW8 is a transactional digital movie service whose proprietary technology can enable creative alternatives to traditional release. It is an exclusive provider of top foreign films that have not been exhibited in the U.S. and domestic titles from independent filmmakers. In 2019 it also signed deals with four major studios for rights to rent and sell new releases and library titles. Its hallmark is a “Movie Love Guarantee” that allows viewers to stop a movie in the first 20 minutes and swap it for a different title at no extra charge.

StoryFit drives story innovation for the entertainment and publishing industries. Combining natural language processing and machine learning with a deep understanding of narrative content, StoryFit measures over 100,000 key features and compares them to thousands of other books or scripts to generate actionable insights. This helps creators to acquire the best content, identify the most effective story elements for audience engagement, track key development changes, and determine the appropriate audience all based on the movie script or manuscript.

The Diffusion Group (TDG) is a media research consultancy focused on providing actionable intelligence on the quantum shifts impacting consumer technology and media behaviors. TDG works with service providers, content developers, and technical product developers looking to master the future of TV and video. TDG provides insights on the consumer marketplace for use at all stages of media creation and distribution — from product concept to market entry, to distribution, positioning and messaging.
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Fresh Transactional Messaging Is Top Committee Priority

One of the highest priorities for DEG’s Marketing Committee moving into 2020 is evolving our industry messaging around the value of transactional media, including digital purchases and rentals.

Even while proliferating streaming options dominate much of consumer and industry conversation about home entertainment, buying and renting premium content remain convenient, affordable ways for consumers to access their favorite content, in its highest quality and earlier than it is available through streaming services.

The Marketing Committee is actively developing a plan to refresh and reframe the industry message about transactional media, with the goal of adopting new messaging that is concise, consistent, and most importantly, relevant to the current marketplace. This includes educating consumers about the different benefits of buying, renting and streaming, and when each of these options becomes available to consumers, relative to a film’s theatrical release.

While specific messaging has not yet been decided, it’s fair to expect that it will touch on the ease of accessing transactional media, the fact that you pay only for what you watch and the early availability for watching in-home. Research will be undertaken in the new year and will help us determine what consumers most value — such as ownership, early availability and bonus content — when they spend money on home entertainment.

We know that bonus content remains a key benefit for both physical and digital transactions, particularly among premium formats such as Blu-ray Disc and 4K Ultra HD Blu-ray Disc, and several studios are now giving bonus features a greater prominence on disc to further engage heavy users.

Universal Pictures Home Entertainment in 2019 developed a new physical product user experience on DVD, Blu-ray and 4K UHD Blu-ray that modernizes the menu interface, showcases the best bonus content and serves as a direct reminder to consumers of the unique added value they receive when they purchase our films. Bonus content options are now prominently displayed on the opening screen, rather than being buried in layers of disc menu options. The new menus also use compelling video clips, rather than text, to introduce bonus features, which also begin playing automatically after film credits.

Universal will provide the bonus content templates for DVD, Blu-ray and 4K UHD Blu-ray to any studio that is interested at no cost. Warner Bros. has already adopted the templates and Sony Pictures will be launching in spring 2020. Other studios continue to consider updating their bonus content presentations.

Finally, the Marketing Committee also is freshening 4K Ultra HD Blu-ray messaging, with a continued focus on the format as the absolute highest quality in home viewing.
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Deployment of Streaming Specs Marked 2019 for Tech Ops Committee

2020 to bring a focus on content editing for AVOD; industry awards

The work of DEG’s Technology and Operations Committee in 2019 resulted in substantial deployments of specs in SVOD, AVOD and D2C distribution. The Committee also contributed to MovieLabs’ publication of specifications for asset ordering and delivery, avails, common metadata, media manifest, ratings, QC nomenclature and API. Through adoption of a suite of compatible standards developed and delivered through industry collaboration the group is able to help enable automation, reduce costs and improve the consumer experience.

“We’ve filled in the gaps, and now we have specifications covering almost every aspect of the supply chain” said Craig Seidel, SVP Distribution Technology, MovieLabs. “There is still work to do, but we are now in a position where anyone can implement these specs with confidence that their use cases have well-documented solutions.”

Much of the Committee’s work was accomplished through the Digital Supply Chain Alliance (DSCA), a collaboration between DEG, the Entertainment Merchants Association (EMA) and MovieLabs. DSCA was established to help improve efficiency, share best practices and drive the adoption of standards for automation of digital workflows. Tech Ops members along with retailers participated on bi-weekly working group conference calls and attended quarterly meetings to collaborate on the best way to strengthen links in the digital supply chain.

“Awards, promo reel to highlight Committee work

Moving into 2020, the Tech Ops Committee also has several additional goals intended to refresh the purpose and heighten the value of the Committee for DEG members. These include: creating DEG Operation/Engineering Awards to recognize enhancements and achievements in the digital supply chain, to be given out at a T&O Awards Show; a new series of brainstorming/problem-solving workshops to provide opportunities for engineering operations teams to discuss business problems and possible solutions in an informal setting; and the creation of a video reel to show the Committee’s history, goals, and benefits to participation.

Committee Co-Chair Lena Wasikowski, VP Global Content Distribution & Operations Strategy for Warner Bros. Technology, said that the agenda for the new year “highlights the importance of this group and working sessions that bring together the best minds in the business to solve problems and make improvements in the overall digital supply chain.”

In summing up the year, John Powers, Executive Director, DEG said that the accomplishments of the Tech Ops Committee and its partners in DSCA exceeded the organizations’ expectations. “People came together, got down to business and produced some of the best work to date,” he said.
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<td>January 7</td>
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<td>Canon Club Private Tour of the Paramount Archives</td>
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<td>D2C Alliance Steering Committee Meeting</td>
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<td>DEG ‘Q’ Member Magazine</td>
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<td>DEG European Road Show</td>
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<td>Hedy Lamarr Awards for Innovation in Entertainment Technology</td>
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