Inside: Meet our new 2022-23 Board Directors from AWS, Samsung Electronics America, Sony Pictures Entertainment and Tubi. P. 10

Mark Your Calendars
DEG’s EnTech Fest B2B exhibition and networking event returns to LA’s Skirball Cultural Center March 29. We’ll be building on our highly successful 2022 event. P. 20

Everything is Digital
First in-person TechOps Awards raised the roof at the DTS Sound Space with 200 guests, crazy camaraderie, and a “Special” performance. P. 26

Fast Forward to 2023
More than two dozen DEG leaders look ahead into 2023 with predictive eyes for new developments driven by consumers, markets, and technology. P. 45

DEG’s Worldwide Web
DEG added 18 new members in 2022, expanding our reach to countries including Argentina, Israel, and South Korea. P. 80

PLUS
We Asked the Analysts
Lucas Shaw, Bloomberg
Michael Pachter, Wedbush Securities
Jessica Reif Ehrlich, B of A. P. 116
“HAUNTING”
— Erik Davis, Fandango

“UNNERVING...SCARY AS HELL.”
— Alyse Wax, Collider

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EnTech Fest
EnTech Fest 2022, the first exhibition event in the group’s history, drew 500 attendees for a premier networking experience and in-person discovery of innovative products relevant to content distribution, display and experience. Page 20

Hedy Lamarr Awards
2022 Innovation Award recipient Paulette Pan- 
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Hedy Lamarr Awards
2022 Innovation Award recipient Paulette Pan- 
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Cover illustration by Tang Yau Hoong / Ikon Images

COVERSTORY:

More than two dozen DEG leaders look around the corner into 2023 with predictive eyes for new developments driven by consumers, markets, and technology. What struck us about their predictions were the recurring themes, including FAST. Page 45

ALSO: DEG’s D2C Alliance Supports Streamers Heading Into AVOD, Live Sports

The AVOD Innovation Group was formed earlier this year to put a spotlight on the key challenges facing buyers and sellers of OTT video advertising that are coming into sharper focus as AVOD viewership grows. The mission of the Live Sports Council is to identify and promote the benefits associated with live sports streaming. Page 58

DEG advocates and promotes entertainment platforms, products and distribution channels that support the movie, television, music, consumer electronics and IT industries.  
DEG can be reached via email at getinfo@degonline.org or through its website at www.degonline.org.
In Best Times and Challenges, Lean in to DEG

It’s the time of year when variations on the Scrooge character dot the entertainment landscape and carol singers in Victorian era costumes serenade shoppers even on sunny southern California streets, so indulge me in a Dickens reference, if you will: Not “A Christmas Carol,” but “A Tale of Two Cities.”

“It was the best of times; it was the worst of times.”

Our industry is amid an evolution of formats and business models that has remade the entertainment experience for consumers by providing more options to connect with the content they love, be it collecting a favorite title, subscribing to a streaming service, or choosing to lean back with AVOD and FAST. Through our direct-to-consumer services, most media companies are forging closer ties with our most engaged viewers. It is the best and most promising of times, and yet for those of us tasked with delivering this content to consumers, the times are also challenging.

In 2022, the level of investment in original content required to build a leading premium video streaming service continues to grow, and the cost of top-tier sports rights and TV series production has risen dramatically. Meanwhile, legacy revenue streams are struggling, and Wall Street is applying pressure for major media companies to add subscribers and build operating cash flow.

On top of it all, many of us work in challenging remote situations, juggling work and family responsibilities from home since the onset of the COVID pandemic.

The thing is, many of us in the DEG community have labored in digital entertainment for more than a decade and have not just weathered previous transitions, but thrived as a result of them.

On a final note, I must say there’s no one I’d rather navigate the industry’s highs and lows with than this DEG Board, particularly my fellow officers Jon Zepp, Andrea Downing, Rick Hack, and our inimitable Chair Emeritus Jim Wuthrich, who has long set a fantastic example of leaning into our community for shared benefit.

Dan Cohen
Paramount Global
and Chair,
DEG: The Digital Entertainment Group

Our industry is amid an evolution of formats and business models that has remade the entertainment experience for consumers by providing more options to connect with the content they love.
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As Content Paths Proliferate, Platforms Help Guide Consumers

Pace of change accelerated during COVID, remains brisk

LOS ANGELES | Reshaping the digital entertainment landscape in the current day requires navigating change at the speed of a hurricane driven by technology innovations and changing consumer behavior, senior Board leaders said in a keynote chat at DEG’s November Annual Membership Meeting, the first held in-person in three years.

The session, officially titled “Reshaping the Digital Entertainment Landscape” could have been called “Inside the Hurricane,” opined DEG Board Chair Emeritus Jim Wuthrich, commenting on the industry’s pace of change over the past year.

The growing complexity of serving consumers was at the center of the discussion moderated by Wuthrich with DEG Chair Dan Cohen, of Paramount Global, and Vice Chair Jonathan Zepp, of Google. Cohen focused on the new ways studios push content to consumers via proliferating business models and in shorter windows, while Zepp built the discussion with insights on helping people find what they want to watch.

Content licensing has become more complicated as major media companies launch their own direct-to-consumer streaming services but continue to monetize content, particularly library content, by licensing to a range of outlets and funneling revenue back into production of new content, Cohen said.

Sharing his experience from decades in the business, Cohen commented on the impact of viewing moving away from linear and pay TV and to SVOD, AVOD and FAST models. Gone, in large part, are lengthy, exclusive deals that once were, replaced in many instances with “non-exclusive” and “co-exclusive” licenses that might run as short as one month, particularly for AVOD and FAST services.

Defining a platform, such as Google TV, as the first thing that a consumer sees when they turn on a TV or a device, Zepp said the platform’s job is to make sense of the many services and business models content is licensed for so that consumers can find what they want to watch with ease. “We have the pleasure of working with everybody in the industry, but it’s a challenge sometimes to make sense of where the content is and to help people find it really efficiently.”
“SUitably TWiSTY”
Los Angeles Times

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When asked by Wuthrich how he would grade the industry in helping consumers find content, Zepp characterized it as “half-way there,” as platforms and services jockey for position with consumers.

Google has focused on the home as the place where people typically want to consume longform programming, and are most confused about how to find what they want, Zepp said, describing search and discovery as a “multi-modal experience” including voice technology.

Shifts in theatrical, home entertainment and streaming windows, spurred by content owners’ efforts to maximize revenue with few to no theaters open at the onset of the COVID-19 pandemic have also increased consumer confusion, the executives agreed.

Cohen shared Paramount’s strategy to move Sonic the Hedgehog 2 to home entertainment after an unusually short 45 days in theaters to try to prolong its life as theaters shut down.

“COVID sparked a lot of innovation, a lot of experimentation, and some changes that have stuck,” Cohen said, noting that 46 days in U.S. theaters is now the norm for many Paramount films, but that circumstances still dictate individual title release patterns. The studio’s smash hit Top Gun: Maverick, for instance, had a traditional, longer theatrical window and was No. 1 in theaters over both the Memorial Day and Labor Day holidays. The studio’s Orphan First Kill, in comparison, opened simultaneously in theaters, transactional home entertainment and on Paramount+, the studio’s direct-to-consumer streamer.

In general, “theatrical makes content more valuable on Paramount+,” Cohen said. Wuthrich agreed: “The number one metric still is box office in predicting downstream success, even with a short window.”

“It’s hard to make consumers understand how windows work,” Zepp added, referencing Google’s transactional service. Nevertheless, though he noted there can be an upside in viewers browsing deeper catalog when they come to look for a specific new release, lengthening engagement with the service and platform.

“If you’re a consumer of content it’s a great time to be alive because there are so many ways you can get the content, from the premium services all the way to the free offerings and so much more great stuff that is coming into them,” Wuthrich said, referencing AVOD and FAST services. Cohen noted that ad-supported streaming is the fastest growing segment of the studio’s business, even with ad sales struggling industrywide.
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DEG welcomed Sony Pictures Entertainment as a returning member in the first quarter of 2022. The studio took an active role in the organization from the get-go, with Spivak immediately being appointed as Special Advisor to the Board. He was then elected as a Board Director for the 2022-23 fiscal year, beginning August 1. SPE also became a member of DEG International during the year.

**DEG: What do you hope to achieve in your tenure on the DEG board?**
**JS:** We are currently living through a great time of change in our industry, as audiences have more choices than ever before in terms of how and what content they consume. I am excited and honored to have a seat at the table as the industry evolves and works to respond to audiences’ changing preferences and expectations.

**DEG: What do you see as the best opportunities for companies across the membership to work together to improve consumers’ digital entertainment experience?**
**JS:** I think the strength of the DEG is the wide breadth of different member companies. Industries from content to platforms to technology to hardware are all focused on the same objective - continuing to find innovative ways to delight and entertain consumers.

**DEG: How do you plan to relax with digital entertainment over the holidays?**
**JS:** I, like many of our consumers, enjoy content in all of its forms. I’m looking forward to getting out to the theater as well as watching the latest releases at home with my family. I am also always up for a new or classic show to enjoy on one of the SVOD platforms, with the new season of *The Crown* being at the top of my list. Additionally, my kids and I are big music fans and enjoy sharing playlists.

DEG: What drew you to make Tubi part of the DEG community?
**AL:** I’ve always been inspired by collective efforts in the media community, such as anti-piracy campaigns. DEG provides an opportunity for us to work collectively to further causes that help promote streaming.

**DEG: When you have time to relax, what’s at the top of your “must watch” list and how do you prefer to watch?**
**AL:** Of course, I watch Tubi, preferably in the living room on a widescreen TV. I’m usually watching nostalgia TV, sci-fi, adult animation and a lot of movies (typically a Tubi Original!).

Adam Lewinson
Chief Content Officer,
Tubi
2022-23 DEG Board Director

DEG: AVOD audiences are growing at twice the rate of SVOD audiences, according to Tubi’s 2022 Brand Insights report, and several large SVOD services are currently expanding into AVOD. What are the consumer trends that you see driving this shift?
**AL:** The history of television has been predominantly ad-supported, so in many ways streaming trends are reflecting consumer preference. In an era when most media companies were moving content behind paywalls, Tubi and our sister companies across Fox are focused on ad-supported television without friction. Subscription fatigue continues to be a pain point for consumers, further fueling the rise of AVOD.

DEG: What do you see as the best opportunities for companies across the membership to work together to improve consumers’ digital entertainment experience?
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Jason Spivak
EVP Distribution – North America Television & Home Entertainment
Sony Pictures Entertainment
2022-23 DEG Board Director

“I’m a guy who absolutely loves the AVOD business,” Lewinson told Variety when he joined Tubi from Sony Pictures Television and Crackle in 2017. “Television should be free.”
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**Sarah Tobin**

VP, Home Entertainment Marketing
Samsung Electronics America
2022-23 DEG Board Director

Samsung Electronics has long held a DEG Board seat. Sarah Tobin was elected as the company’s new representative for the 2022-23 fiscal year, beginning August 1.

**DEG: What do you hope to achieve in your tenure on the DEG board?**

ST: I’m looking forward to helping DEG tackle some of the key challenges facing the industry to move us forward in what’s expected to be a tough but exciting year. Personally, I’m also hoping to collaborate and learn from the amazing members of this organization, and building more relationships and connections that will help all of us succeed.

**DEG: What do you see as the biggest opportunities for device makers to help improve consumers’ streaming experience?**

ST: When it comes to the connected home, removing friction from the experience is key. That means eliminating barriers from the set-up process, reducing the multiple steps required by the user and making those automatic and in the background. That also means developing UIs designed with the user top of mind – those that reflect how people actually like to interact with their devices and helping them to access their preferred content and connections seamlessly.

**DEG: How do you plan to relax with digital entertainment over the holidays?**

ST: I’m looking forward to spending some down time with my two daughters over the holidays, watching movies and catching up on shows together. We’ll definitely be doing a lot of gaming on our new Samsung TVs over the school break too. Xbox just released a study that more and more families are gaming together at home – and that’s very true in our home. And lucky for my girls, we have a pretty great Samsung TV setup that comes with Gaming Hub built in, so I expect a house full of their friends joining the fun too.

---

**Chris Blandy**

Global Leader Strategy & Business Development, Media & Entertainment
Amazon Web Services
2022-23 DEG Board Director

Amazon Web Services (AWS) joined DEG in mid-2022 and Chris Blandy was elected as a Board Director for the 2022-23 year, beginning August 1. Blandy brings to the board deep perspective on content production and distribution in the cloud, with experience at both Amazon’s cloud platform and 20 years at studios Disney and Fox.

To learn more about Blandy and his perspective, check out his interview with Rich Berger of MovieLabs about entertainment companies’ cloud transitions, security and how content creation workflows will evolve as the industry gets closer to MovieLabs’ “2030 Vision” for media creation.

When asked by Berger how industry technologists can prepare for the future, Blandy said this: “I think one of the biggest lessons learned is that it’s not just a technology project. It’s not about just taking what you’re doing today and reengineering it for the cloud. It’s also a business transformation and operational change project. You really need to think about innovative ways to work and new ways of doing things, because you’re unlocking so much potential in terms of how to do work. You can rethink your whole workflow.”
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We’re All on a Wild Ride

Amid dramatic industry turns, DEG remains a place to get work done together

Does anyone else feel like they are on a roller coaster? This ride began almost three years ago with the start of widespread remote work as a result of the worldwide COVID-19 pandemic. We stepped into the coaster car warily, with doubts about what was ahead. But we did strap ourselves in, and quickly learned we could roll with the flow, leaning this way and that as the track dictated. We set up home offices, produced or attended online meetings for networking and knowledge sharing, and became accustomed to talking into our computer screens for hours per day while wearing professional gear on top and sweats on the bottom.

Contributing to the uneasy ride were more twists and turns in our business. Disney integrated the 21st Century Fox operations, Warner Bros. uncoupled from AT&T and joined with Discovery, MGM became part of Amazon. More direct-to-consumer operations launched, and grew, as consumers sought – and paid for – more options for entertainment delivery to the home during the pandemic. But when out-of-home activities resumed, viewers questioned how much they were spending on entertainment subscriptions. Free ad-supported services became more attractive, and their quality improved. Churn at paid services grew, at the same time costs for content production and acquisition climbed. Wall Street, once a champion of DTC, began to question streaming economics and sometimes, the M&A activity that is reshaping the entertainment distribution landscape.

But despite all the dramatic terrain we’re flying across, there is terra firma below, where we continue to put one foot in front of the other. As individuals, companies and a DEG community we stay the course and get the work done of distributing entertainment to consumers with the best possible experience, which has been DEG’s mission for 25 years.

When things are moving fast, I encourage you to lean into DEG and take advantage of the benefits our community offers. Those include working collaboratively in committees to tackle common challenges, and a learning focus in others, to share knowledge in emerging areas such as advertising metrics. All of this helps make sense of the scene flying by.

Meanwhile, our Los Angeles events provide an opportunity to both work and socialize with colleagues across the industry in-person. With much work continuing to be done remotely, we recognize that meetings and conferences may fill a different need for collaboration than before. Our second annual EnTech Fest, scheduled for Skirball Cultural Center on March 29, will have new opportunities for company and cross-industry meetings, breakout sessions and committee meetings, networking with industry leaders including DEG Board Directors, and social activities, in addition to the new technology showcase at its core.

As part of DEG’s community, we’re on this ride together. Working as an industry, we will navigate this ever-changing wave of evolving entertainment options in the home.
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First EnTech Fest Exhibits Put Spotlight on Content Distribution, Display and Experience

EnTech Fest 2023 scheduled for March 29 in Los Angeles

LOS ANGELES | EnTech Fest 2022, the first DEG-produced exhibition event in the group’s 25-year history, drew 500 attendees to Skirball Cultural Center in early May for a premier networking opportunity after a long time apart, and in-person discovery of innovative products relevant to content distribution, display and experience.

Event features over two days included an in-car entertainment gallery, a data-rich look ahead at the new ways consumers are...
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embracing media with presenters Deloitte, The NPD Group and Whip Media, and DEG’s annual industry networking reception, in addition to an exhibit floor and meeting rooms showcasing 20 technology installations.

EnTech 2023 will take place on March 29, again at Skirball Cultural Center, with a new one-day format including exhibits, an expanded conference program and DEG’s annual reception. Planning is underway with DEG staff working with an advisory group including executives from Amazon, Dolby, Intel, LG Electronics, Looper Insights, NBCUniversal, Paramount Pictures, Sony Pictures, Warner Bros. Discovery, XL8 Inc., and Xperi. Attendee registration will open by the end of January. Watch the DEN for updates. Photos: Bob Elliott

Chris Carey (l.) shows off Iyuno’s localization technology to DEG Board Directors on a VIP tour.

Who traveled the farthest to attend EnTech? The team from South Korea-based Blintn! (From l.) Harry Jung, Leah Hong, Peter Choe, Wendy Lee, Haein Park.

BB Media’s Adriana Iris Franco (l.) and Fabric’s Donna Esfandiary.

DEG Performance Reporting committee leaders Jeremy Enos of Paramount (l.) and Bill Radding of Warner Bros. Discovery.

Altman Solon’s Mary Ann Halford and Derek Powell represent.

The NPD Group group (l. to r.): Rod Labuni, Katie Elzy, Elizabeth Lafontaine and Disney’s Dawn Holliday.
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**Omdia’s Peter Rowan and Marija Masalskis.**

**Blu Digital Group’s Chris Saito and DEG’s Andi Elliott.**

((I.) Yolanda Macias of Cinedigm and Joe Kahle of Roundabout Entertainment catch up. (R.) Sony Pictures’ Jason Spivak and DEG’s Amy Jo Smith.

**FansXR shows its real-time XR streaming platform that supports immersive fan experiences.**

**Xperi/DTS showed a Mercedes-Benz as a unique environment for media consumption. WBD’s Bill Radding (l.) takes a look.**

**Iyuno’s iDub remote recording solution.**

**The Intel team showed 8K, deep fake detection technology and more.**

((from l.) Rich Marty, Tom McAndrew and Ron Geller of Dolby pose with the company’s display of Atmos technology for automobiles.**
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Members of DEG’s Advanced Content Delivery Alliance and the broader community showed up in force to celebrate innovation in content distribution at DEG’s second annual – and first in-person – TechOps Awards, presented by Xperi at the DTS Sound Space here on October 12. The room buzzed with excitement as many friends and colleagues greeted each other face-to-face for the first time in many months at the awards presentation and networking reception generously sponsored by Audacy, Blu Digital Group, Dolby and Whip Media, in addition to Xperi. Everyone was met with the opportunity to experience a Blu Mojito, and a red carpet-style photo against the step-and-repeat.

Rapper Ed “Special Ed” Archer opened the show with a live performance of his song, “Everything is Digital (DEG),” which was written for the first TechOps Awards. He set the tone for the evening, and the energy in the room was off the charts. Past winners and award sponsors handed out the crystal trophies with gratitude and anecdotes. The support in the room was palpable, with loud cheering for every nominee and winner. – Bekah Sturm

Five awards honored nine winners, with multiple recognitions in some categories. The TechOps Awards were conceived in 2020 by DEG’s then-named Technology & Operations Committee, now known as Supply Chain Efficiency & Security, and the inaugural TechOps Awards were held digitally in 2021. Rapper Ed “Special Ed” Archer opened the show with a live performance of his song, “Everything is Digital (DEG),” which was written for the first TechOps Awards. He set the tone for the evening, and the energy in the room was off the charts. Past winners and award sponsors handed out the crystal trophies with gratitude and anecdotes. The support in the room was palpable, with loud cheering for every nominee and winner. – Bekah Sturm

200 guests and a ‘Special’ performance combined for a memorable evening

LOS ANGELES | Members of DEG’s Advanced Content Delivery Alliance and the broader community showed up in force to celebrate innovation in content distribution at DEG’s second annual – and first in-person – TechOps Awards, presented by Xperi at the DTS Sound Space here on October 12. The room buzzed with excitement as many friends and colleagues greeted each other face-to-face for the first time in many months at the awards presentation and networking reception generously sponsored by Audacy, Blu Digital Group, Dolby and Whip Media, in addition to Xperi. Everyone was met with the opportunity to experience a Blu Mojito, and a red carpet-style photo against the step-and-repeat.
TERRIFIER 2
STREAMING EXCLUSIVELY ON
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Spherex’s Teresa Phillips holds her Trailblazer Award high.

The Disney Media & Entertainment Distribution Single Ingest Pipeline Team takes the stage to accept the Technology Innovation Award. Dmytro Bielievsov, Grant Reaber and Alex Serdiuk of Respeecher also won, but were unable to travel from Ukraine.

Best Multi-Company Team Collaboration winners Warner Bros. Discovery Global Content Servicing and Solutions Team, led by Kejo Swingler (at mic) and Giant Interactive Client Services Team, led by Meri Hassouni (l. of Swingler).

Disney’s Al Rundle was the second winner of the Technology Achievement Award, presented by Whip Media. Tubi’s Adriana Becerra also won, but was unable to attend.

Rick Hack (l.) and Ravindra Velhal of Intel were the first of three winners of the Technology Achievement Award, presented by Whip Media.
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Blu Digital’s Yelena Makarczyk (at left) delivers a moving speech for her Everyday Hero Award. Cassandra Moore of NBC Universal admires her Everyday Hero Award.

The Lifetime Achievement Award, presented by Dolby, went to Michael Daruty of NBC Universal.

Attendees voted on the People’s Choice Award during our cocktail reception. The honor went to the Warner Bros. Discovery Global Content Servicing and Solutions Team and Giant Interactive Client Services Teams.
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Paulette Pantoja of Blu Digital Group Accepts 2022 Hedy Lamarr Award

Sixth annual honoree chosen for her entrepreneurship and evolution with the industry

LOS ANGELES | DEG’s Hedy Lamarr Award for Innovation in Entertainment Technology was accepted by Paulette Pantoja, Founder & CEO of Blu Digital Group, on November 15 here, as the culmination of DEG’s first in-person Annual Membership Meeting since 2019. Pantoja’s longtime friend and colleague Schawn Belston, Head of Global Delivery at Amazon Studios, presented her with the award. In its sixth year, the Hedy Lamarr Award recognizes female executives in the fields of entertainment and technology who have made a significant contribution to the industry.

Pantoja, who is widely respected throughout the digital entertainment industry as a media technologist and entrepreneur, founded Blu Digital Group in her apartment in 2007 with a focus on quality control for film and TV content distributed on physical media. Her focus on proprietary workflows and her patented applications have since grown the company into a go-to solution for content owners and platforms of all sizes that need to deliver streaming content at highest quality and with best user experience. Blu Digital Group’s cloud-based automation software for content distribution has demonstrated real innovation, and Pantoja’s expansion of the localization division within Blu beginning in 2021 further broadened the company’s ability to deliver international content to audiences around the world. Working with major studio and platform clients, Blu Digital Group has reached over 300 million viewers, provided media services for more than 25 film and TV titles recognized by the Academy Awards and Emmy Awards, and has serviced three million content hours.

A strong advocate for women and other underrepresented people in entertainment technology, Pantoja’s drive and passion for both the field and her company was palpable in her award acceptance. She spoke of...
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her struggle with confidence, sharing that she questioned whether she was “good enough” and if she “had what it took” to begin her business. Despite others telling her not to quit her regular job, Pantoja chose to build Blu Digital Group and ultimately patent her company’s proprietary workflow solutions. She credited social psychologist Amy Cuddy’s TED talk series as a primary confidence booster that validated all the feelings she was having being a new business owner. “It allowed me to go ahead and try. And that’s what you do, you try, and you fail, and you learn…luckily, I succeeded but I learned,” Pantoja said.

In accepting the award, Pantoja acknowledged the support of her team, her wife and her mentors, many of whom were in attendance and filled the room with applause. “I surround myself with people that I love to work with, people who are like-minded individuals, who share the same passion and goals that I have, and I’m so proud of the team I have today,” Pantoja said.

She shared a Lamarr anecdote about pursuing passion, rather than recognition, quoting, as Lamarr was known to, from a poem by Kent M. Keith. “Give the world the best you have and you’ll get kicked in the teeth. Give the world the best you have anyway.”

Under Pantoja’s leadership, Blu Digital Group is part of the NGLCC (National LGBT Chamber of Commerce) as well as Women Owned, an initiative from the Women’s Business Enterprise National Council (WBENC) and WEConnect International to promote women-owned businesses. In 2021, Blu was recognized as one of the Inc. 5000 Fastest-Growing Private Companies in the U.S. and Pantoja this year was an Ernst & Young Greater Los Angeles Entrepreneur of The Year 2022 finalist. – Margot Hoffman

About the Hedy Lamarr Awards

Often called “the most beautiful woman in film,” legendary actress Hedy Lamarr (Ziegfeld Girl, Tortilla Flat, Samson and Delilah) was also a lifelong inventor whose work included pioneering “frequency hopping,” which became the foundation for spread spectrum technology. Conceived by Lamarr and composer George Antheil for radio guidance systems and patented in 1942, this highly secure technology is utilized today for a variety of cellular, Wi-Fi and Bluetooth applications. Inspired by her accomplishments, DEG recognizes pioneering work by the multi-faceted female leaders in our industry today.

Past Hedy Lamarr Innovation in Entertainment Technology Award Winners:

2021 Poppy Crum Chief Technology Officer, Trimble Former Chief Scientist, Dolby Laboratories

2020 Sara DeWitt, VP, PBS Kids Digital

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

2018 Nonny de la Peña, CEO, Emblematic Group

2017 Geena Davis, Founder & Chair, Geena Davis Institute on Gender in Media
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The 2022 Hedy Lamarr Achievement Award for Emerging Leaders in Entertainment Technology, honoring a female college student whose studies in the fields of entertainment and technology have shown exceptional promise, was presented to Danielle Takahashi, an undergraduate student at the University of Southern California who is majoring in Media Arts and Practice in the School of Cinematic Arts.

Takahashi works in 3D game art, motion graphics, arts-based research, education, science visualization, and music visuals with the goal of creating a healing process to overcome social issues, and to prompt and guide emotional journeys through storytelling. While at USC, she has been developing a speculative design structure to combat the habitat fragmentation of bees and engage the public to be closer to the life cycles around them. She writes, directs and animates short films, including a multimedia piece for the Wrigley Institute for Environmental Studies on the Kelp Biofuel Project, an innovative approach for cultivating kelp in the open ocean.

In her award acceptance remarks, Takahashi shared plans to use her financial award to fund her thesis film and to study abroad in Japan.

DEG talked with Takahashi about her desire to use artistic skills for empowerment and social justice, and what influences her work.

DEG: In your Hedy Lamarr Award application, you discuss your desire to use your artistic skills for empowerment, social justice, and fostering empathy through storytelling. Tell us more – how do you hope to do that? If you could produce your dream project, what would it be?

DT: My strongest motivation as an artist is to create a healing process to overcome social issues, prompt and guide emotional journeys through storytelling, and challenge consumers to be productive with these feelings. From the way popular media and fine art has affected me, I have learned that what I create helps work out my own dreams, feelings, and attempts to meaningfully connect with others, so I want to spread these experiences for social good. This can be in many forms, from critical engagement with heavy issues to pure lightness and entertainment as an escape from negativity.

I’m currently directing and creating an animated short I wrote called “The Journey” about the nonlinear nature of mental health issues, time, and healing. It is told through environments that represent deep emotions. If I could produce my dream project, I’d love to continue expanding these constructions into a larger media, like an immersive experience or feature film. Ultimately, I want to continue building worlds that give spaces for societal and personal healing.
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DEG: Can you share some examples of current popular media that you think does a good job of advancing social justice and fostering empathy?

DT: I could go on about my popular media inspirations for a long time. Some of my favorites are Undone (TV), BoJack Horseman (TV), Sorry to Bother You (film), Everything, Everywhere, All at Once (film), Kendrick Lamar (music), Blood Orange (music), The Last of Us (video game), and Journey (video game).

I never expected that BoJack Horseman would influence my artistry so much and would move me to feel such deep emotions for its characters, reflect on my own values, and laugh so much. It touches on awkward topics, criticizes industry issues that are often considered taboo, and engages deeply with its characters’ emotional struggles in a way that brings insight and comfort. The show took time to accurately explore intense issues such as depression, trauma, fame, addiction, #metoo, accountability, and unhealthy coping, in ways that are handled with strong intentions, sensibility, and purposeful wit.

The Last of Us Part II is special to me because I enjoyed playing it with my dad during lockdown. On top of being fun to play while discussing the heavy theme of forgiveness, the important thing about it is that it normalizes its array of diverse characters who get to have their own powerful story arcs without tokenizing their identities.

DEG: How does this approach to your work help you to relate to Hedy Lamarr?

DT: Rather than solely making money from Hollywood, I admire that Hedy Lamarr felt a duty towards innovation and improving communication systems. Like her, I feel a responsibility to use my talents for social good.

As a researcher, I want to ground myself in history and culture to cultivate social awareness and operate need-based problem solving. A successful creative process involves being simultaneously reflective and progressive, takes advantage of the resources available, and has a strong purpose. I can learn so much from those who have done so before me and paved the way for women in arts and technology, like Hedy Lamarr.

My favorite story of Lamarr’s is how she came up with a faster plane wing design for Howard Hughes by studying fish and birds. Similarly, I incorporate biomimicry into my design practice and aim to take it further with biodesign, the integration of art and science for designing with living materials.

I have a lot of big dreams, and they include continuing to pursue a wide array of fields from arts-based research to music visuals. Hedy Lamarr was someone who proved we can achieve such disparate dreams and not allow a single discipline to hold us back.

Hedy Lamarr Emerging Leaders Award Honor Roll

2021
Shambhavi Mishra
Carnegie Mellon University

2020
Molly Mielke
University of California, Los Angeles (UCLA)

2019
Maya Tribbitt
University of Southern California (USC)

2018
Cassidy Pearsall
Carnegie Mellon University

2017
Johanna Baumann
University of Michigan

Takahashi (2nd from l.) accepts congratulations from (l. to r.) DEG Chair Emeritus Jim Wuthrich of Warner Bros. Discovery, DEG’s Amy Jo Smith, DEG Chair Dan Cohen of Paramount Global, DEG Vice Chair Jon Zepp of Google, and DEG CFO Andrea Downing of PBS Distribution.

Takahashi (r.) with her grandmother, who jumped out of her seat to a round of applause when Takahashi acknowledged her influence in acceptance remarks.
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Media Play News ‘Captains’ Panel Addressed Progress Made and That Still Needed

Hiring practices, allyship, mentoring seen as key to supporting women’s professional growth

LOS ANGELES | As a lead-in to the annual Hedy Lamarr Awards, four of Media Play News’ female “captains” of home entertainment took the stage at DEG’s annual membership meeting to discuss concrete ways to elevate often underrepresented voices within the workplace, specifically emphasizing a necessity for mentorship, allyship, and encouraging women’s confidence.

DEG Board CFO Andrea Downing, President of PBS Distribution, moderated the panel – featuring Ellen Goodridge, Head of Worldwide Media Management and Distribution at Amazon Studios, Yolanda Macias, Chief Content Officer of Cinedigm, and Shalini Govil-Pai, VP and General Manager of Google TV – focusing on expanding the possibilities for participation and cultivating an industry that promotes and rewards personal experience.

Goodridge said she believes that this begins at the early stages of the hiring process, noting that companies should aim to be “conscious of biases” when hiring. For employers, reaching out and finding a diverse pool of candidates is a crucial first step in promoting diverse thought, she said.

In terms of hired candidates, Google’s approach to fostering a diverse workplace environment includes building allyship. Specifically, Google’s model focuses on community-driven groups, such as Women@Google and Disability Alliance, that help connect individuals who may belong to marginalized communities.

These communities promote diverse thought and ideas, benefiting both the product and the community itself. “It’s just good business to bring in representation,” said Macias, adding that not including certain voices is ultimately “a disservice to the marketplace and consumers.”

The panelists all agreed that promoting diverse thought and ideas within their companies can benefit both the work communities and the products that they turn out.

Visibility and mentorship within the workplace are especially important in creating pathways to success for women and other underrepresented groups who may lack the confidence to pursue promotions, panelists noted. Goodridge said that senior leadership in entertainment and tech companies should be compelled to utilize their voices to “not just talk the talk but walk the walk.” Those in senior positions have the opportunity to “be allies and bring forth folks who for whatever reason aren’t accustomed to being heard,” she said.

The women shared anecdotes from their own careers, such as Govil-Pai noting the impact mentors can have in building confidence. She related her experience with mentor Susan Wojcicki, CEO of YouTUbe, who advised “swimming ahead” of the crowd and practicing proactivity in the workplace.

The panel also addressed the workplace challenges and opportunities related to the COVID-19 pandemic, which for many people has created a mash-up of professional and private roles as a result of working remotely from home. While difficult, the move to work-from-home, which appears to be here to stay to various degrees

“Confidence and resiliency haven’t been straight linear growth, but have come from the experience of continually taking on challenges ... Once you work through a tricky situation on its own terms — even if it doesn’t turn out as planned — you can take that with you into the next level of problem to solve as a key opportunity to learn and grow.”

– Ellen Goodridge, Amazon Studios

“The advice I would give to future female leaders is that if you are in the room, act like you belong there and contribute productively to the discussion.”

– Andrea Downing, PBS Distribution
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“Invest in your team and provide them the tools to succeed. Be clear about the direction and mission of the company. Overcommunicate the company’s strategy to support every team player’s role in the context of company goals.” – Yolanda Macias, Cinedigm

across the industry, has exposed the necessity for revisions to policies including parental leave and caregiver accommodations to provide an equitable workplace experience.

Beyond caring for family members, the COVID-19 pandemic also shed light on the diminishing social bonds within the workplace. Govil-Pai addressed the situation for many younger workers, who in working from home are challenged to build workplace social relationships and reach out for mentoring opportunities.

The takeaway, succinctly summed up by Macias: “We’ve made progress, but not enough.” – M. H.

Editor’s note: Panelist pullquotes are from their Media Play News interviews. Read them in full at www.mediaplaynews.com.

“It pays to strategize and swim ahead of the pack, expressing your opinions to key decision-makers early on. First, it helps you to understand their perspectives so you can reshape yours as necessary. And, secondly, the power of getting in first ensures you’re heard with an unbiased perspective.” – Shalini Govil-Pai, Google TV

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Source: SNL Kagan; FilmRise Internal reporting
WHAT STRUCK OUR EDITORS ABOUT THESE PREDICTIONS is how interrelated they all are. Take FAST. Its growth is definitely a top industry trend, much talked about and covered in the media. Here, it not only came up in relation to consumers’ entertainment usage and the evolution of ad-supported streaming, but also as a factor in driving demand for localization. Similarly, we asked about how cloud will improve efficiencies in entertainment distribution, but people also mentioned cloud in relation to most important emerging technologies and security enhancements. Like the pebble tossed into a pond, these topics ripple out far and wide.
A: The past few years saw unprecedented interest in and consumption of content, partly due to the pandemic, but also because of the launch of several major streaming platforms. The rise in premium creative content has exploded and there continues to be unflinching consumer appetite for compelling storytelling. At the same time, consumers are embracing ad-supported viewing – a function of both on-demand and FAST channel streaming becoming even more mainstream. But even as viewers enjoy more choices, we remain encouraged by annual growth across our three SVOD services – A&E Crime Central, HISTORY Vault, and Lifetime Movie Club – evidence that enthusiast audiences are eager to lean into a deep, curated assortment of content within a specific genre.

— Piper Rosenshein, VP SVOD, A+E Networks

A: I don’t see the user choice as being between leaning back and leaning in for viewing, but rather leaning into the right customer experiences. Over the last few years, there has seemingly been a trend in viewers seeking a broadening range of content in a variety of venues and on various platforms. This trend, driven in large part by the pandemic, the rise of new streaming platforms, and the continuing escalation of technology, is at a crossroads – evidenced by the shakeups we see throughout the entertainment and tech industries. For consumers, their appetite for choice will not wane and will cause viewers to further build their individual bundles of entertainment options – AVOD, SVOD, TVOD, social, theatrical, live events – and content creators and distributors will be driven to foster more organic connections. In short, what was considered leaning back will have more components of a lean in experience (e.g., watching on a large TV with more an increasing amount of interaction), while those aspects of lean-in will blend close enough to further blur the line.

— Chima Ogbuokiri, SVP Growth & Partner Marketing & Strategy, AMC Networks

A: With insight into consumer demand for movies in theaters, at home, and on the go, AMC Theatres sees a rebalancing of entertainment consumption over the year ahead. More moviegoing in theaters, sustained TVOD consumption of the popular movies with variable release windows, slowing premium streaming service adoption, and growth of ad-supported streaming services. It will all add up to more consumers enjoying more movies, enabled by a wider variety of business models.

The evolution has occurred in phases. First, digital stores and platforms saw an exponential boost when consumers were confined to their houses and dependent upon home entertainment to fill their time. Then, promotional bundles and offers drove adoption of newly launched streaming services. As studios ramped up theatrical releases and movies returned to America’s cultural zeitgeist, both box office and TVOD demand grew for many films.

Audiences are also becoming more discerning around the content they consume. This bodes well for all sides of the business, as we are optimistic about offerings that are coming our way in 2023, and beyond.

— Nikkole Denson-Randolph, SVP Content Strategy, AMC Theatres

A: Consumers will inevitably be more price sensitive in 2023, and thus, more likely to proactively manage their media budget. However, I believe overall entertainment consumption will hold steady or grow since consumer choice across price points is heading to an all-time high with FAST channels proliferating and ad-supported tiers being added to premium services. In this market, people will continue to flock to premium, but I expect they will complement must-have premium with free lean back experiences and ad supported tiers on certain services.

— Karin Gilford, SVP Digital Media & GM, Movies Anywhere
Bye, Bye, Streaming Struggle

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A: There will continue to be multiple modes of entertainment consumption in 2023. In the New Year, however, consumers are more likely to be conscious of value. Do we still need this subscription service, or should I upgrade/downgrade/eliminate? Can we tolerate a few ads in this casual viewing session? Should we buy this, or should we just rent it? Should we splurge on a family night out at the movie theater? Tools like Rotten Tomatoes will become more valuable, not only to validate fans’ entertainment choices, but to help people find value in what to watch next.

— Cameron Douglas, VP Home Entertainment, Fandango/Vudu

Q: How will the AVOD ecosystem look different a year from now, from an industry perspective and a consumer perspective?

A: I expect we’ll see continued rapid evolution and growth in the AVOD (VOD and FAST) space over the next 12 months. As AVOD in the US continues to scale, it’s pulling in all content players, including every major studio. The rallying around AVOD will translate into increased content quantity and quality (both hit library IP and originals) in AVOD offerings. In the most telling sign of change, current content will begin shifting its premiere from network/cable to AVOD. As the AVOD audience and viewing time continues to grow, the ad market will innovate to maximize revenue potential via new ad experiences such as more relevant ads, advertainment, and virtual product placements. As more revenue is generated, technological investment in AVOD will grow, bringing a better consumer experience.

We will also see not just continued cord cutting, but also further migration from SVOD to free AVOD, accelerated by the reduction in real wages on account of inflation.

— Daniel Gagliardi, VP Digital Distribution & Business Development, FilmRise

A: CTV has become a critical component of the digital advertising landscape and the industry must adopt new technologies to support a content ID ecosystem to ensure a better user experience for brands and consumers. With new content being published every day, having a content ID for streaming that is supported by all major ad platforms can solve problems. Brands and advertisers are experiencing serious challenges to frequency management, brand suitability, and the ability to measure ad effectiveness due to inadequate content transparency in CTV. Marketers don’t have visibility into where their ads are placed, and buyers are left unable to access content data. With the rise of AVOD and FAST, consumers understand the value exchange of quality content and ads. Content IDs can deliver on that value exchange by making sure relevant ads are delivered in relation to the content being played and provide unique ad interactions in today’s CTV landscape.

— Field Garthwaite, CEO and Co-Founder, IRIS.TV

A: AVOD will continue to grow and improve in 2023 beyond library content. Sports should see more investment into programming and studio shows across AVOD, allowing more fans to engage in and around sports and events while pushing to more premium subscription streaming services to watch live.

— Rob Stecklow, SVP Program Marketing, Sports & News, Paramount+

A: There is no denying that the AVOD model is at a time of huge popularity. In fact, it is the main model with which households complement the use of SVOD content. However, there are still more users who choose to pay a subscription or combine SVOD with traditional pay TV or FTA/broadcast channels. AVOD will continue to be a leading trend as users transition to online viewing. SVODs shall offer AVOD alternative plans to attract new audiences, something that many had declared was not going to happen. ASVOD (ad-supported SVOD) will definitely be a thing. What’s the meaning behind this? People’s needs directly affect the actions of companies, since without happy users there cannot be a high rate of subscriptions and consumers, so streaming platforms must be prepared for any type of user.

— Tom Gennari, CEO, BB Media
The Globalization of Streaming

U.S. viewers are increasingly watching international titles on Netflix. Share of total international genre views grew from 14% in 2019 to 22% in 2022. See the latest insights from Subscription Video Track ...

<table>
<thead>
<tr>
<th>U.S. Viewing Time Spent</th>
<th>Title Breakdown: English vs. Non-English Speaking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Genres</td>
<td>International Genres</td>
</tr>
<tr>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>% Increase</td>
<td>% Increase</td>
</tr>
<tr>
<td>January 2019</td>
<td>May 2022</td>
</tr>
<tr>
<td>2019</td>
<td>2022</td>
</tr>
<tr>
<td>% Change</td>
<td>% Change</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title Spotlight: Total Title Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Genres</td>
</tr>
<tr>
<td>-1%</td>
</tr>
<tr>
<td>International Genres</td>
</tr>
<tr>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>English Speaking</th>
<th>Non-English Speaking</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>32%</td>
</tr>
<tr>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>-11%</td>
<td>35%</td>
</tr>
</tbody>
</table>

*Domestic genres and international genres that primarily speak English

Top Viewed International Content on Netflix

**Movie Genres**

<table>
<thead>
<tr>
<th>#1</th>
<th>#2</th>
<th>#3</th>
<th>#4</th>
<th>#5</th>
</tr>
</thead>
<tbody>
<tr>
<td>British</td>
<td>Latin American</td>
<td>European</td>
<td>French</td>
<td>Canadian</td>
</tr>
</tbody>
</table>

**TV Show Genres**

<table>
<thead>
<tr>
<th>#1</th>
<th>#2</th>
<th>#3</th>
<th>#4</th>
<th>#5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japanese</td>
<td>Canadian</td>
<td>British</td>
<td>Korean</td>
<td>Latin American</td>
</tr>
</tbody>
</table>

NPD's Subscription Video Track provides insights about the content U.S. viewers watch on major SVOD platforms like Netflix, Hulu, and Amazon Prime. This consumer-based service combines behavioral insights, household demographic data, and rich, title-level metadata. Analyze how much of a particular TV series viewers watched, explore related content, and track other longitudinal trends.

*Source: The NPD Group/Subscription Video Track, Netflix, U.S., January 2019 – May 2022*

Questions? Contact your account representative or email sheryl.harkins@npd.com.
What new or emerging technology do you expect to most impact your business in 2023, and how so?

A: With the widespread adoption of HDMI 2.1a in consumer electronics products, we see spatial audio, QMS and SBTM as the most impactful technical features significantly improving the cinema experience in the home. Spatial audio such as Dolby Atmos and DTS:X brings multi-dimensional sound via AVRs and soundbars to immerse the viewer in the sound field. Quick Media Switching (QMS) enables the viewer to quickly switch content that has different frame rates without having frozen video or worse, black screen. Source Based Tone Mapping (SBTM) is a new feature that enables video services to improve their on-screen guides that display multiple video thumbnails with SDR, HDR and dynamic HDR formats coupled with graphics. Content creators and distributors who implement these capabilities can deliver a significantly improved home theater experience to consumers.

— Rob Tobias, Chairperson, CEO & President, HDMI Licensing

A: The compounding growth of LG Channels on our platform has been nothing but incredible. We believe the consumer demand for Free Ad-Supported Television will drive new UX and product innovations as we continue to develop features that consumers will love even more in the future. As more regional broadcasters transition to ATSC 3.0 distribution; we anticipate the quality of the total experience from this emerging standard will spur on even more high value choices for consumers to change how they get live TV and bring new experiences to local broadcast.

— Matt Durgin, Senior Director, North America Partnerships, LG Electronics

A: The next phase of evolution for streaming platforms will require them to distinguish themselves by offering next-level picture quality, very likely as subscription tiers. Beyond 4K and HDR, high frame rate (HFR) will come into the limelight in 2023, propelled by Avatar: The Way of Water, and re-releases of the original Avatar and Titanic, all available in cinematic, motion graded 48fps HFR.

— Richard Miller, EVP Technology, Pixelworks

A: We believe that continued advancements in public cloud offerings—including more competition between the players—will have the most tangible impact of any single “technology” on Rightsline’s business in 2023. While it’s tempting to say something sexier like blockchain or the metaverse, those technologies are still too nascent to have a dramatic short-term effect on an enterprise SaaS provider that is not centered around one of them. Rather, the continued accessibility to powerful technologies enabled by cloud computing platforms enables our customers to manage more sophisticated enterprise environments. The ability to easily integrate technologies such as AI and ML makes automated, data-driven workflows more possible than ever within the IP Commerce space.

— Matt Bricker, CTO, Rightsline

A: 2023 is setting up as the year when platform-enabled AI that aids consumer search and discovery of titles across all services at once from the home screen finally begins to bring back the ROI necessary for studios to once again greenlight and invest in marketing beyond the tentpoles. Against the backdrop of greatly reduced valuations earned from streaming subscriber counts, and a renewed studio need to drive film profitability, studios will increasingly return to releasing films as brands that maximize long term film profits, rather than as programming blocks to support bundled services.

As such, I’m excited to see what industry partnerships emerge to unlock more value from the aggregate consumer appetite for movies – via deepened digitally-powered fan experiences and franchise engagement, enhanced product feature sets with digital goods and experiences, integrated title release strategies with theaters and other retail partners, and through performance-based marketing initiatives to loyalty programs and audiences by studios and services alike!

— John Calkins, Advisor, ROW8
Streamline. Simplify. Scale.

Our SaaS platform combines automation and insights allowing entertainment companies to reduce costs and improve content monetization for today’s increasingly complex challenges.

LICENSING
CONTENT PLANNING
FINANCIAL OPERATIONS
CONTENT & AUDIENCE INSIGHTS

Content Value Management™
The Enterprise Cloud Platform Powering the Entertainment Ecosystem
A: FAST channels are changing the digital streaming landscape, offering new opportunities for content owners to capitalize on their deep content libraries. To reach global audiences, content needs to be localized. Traditional dubbing productions are too expensive, too slow, are manual intensive and are unsuitable to accommodate the demand that is created in light of that.

Automated dubbing workflows for unscripted content represent the only viable solution to offer low-cost dubbing at lightning speed turnaround times, designed to enable quick launch of FAST channels in new markets.

— Oz Krakowski, Chief Revenue Officer, Deepdub

A: Next year will be a year of continued expansion around cross-cultural entertainment production and distribution as the major global streaming operators keep expanding their reach to find and produce content in more diverse locations and cultures around the world. This means that as a localization supply chain provider we will see more non-English content needing to be localized into English, as well as all the other global languages. We also anticipate a greater need for complete end-to-end media services, making the supply chain continuously more efficient, and even more focused on creative quality throughout the entire localization process.

— Chris Carey, EVP, Americas Operations & Global Marketing, Iyuno

A: Consumers will cut back on subscriptions to streaming services. They’ll maintain the one or two services they value most, like Amazon Prime, Netflix, or Apple+, and then cycle through a few more based on programming. Monthly churn will reach 50 percent for many streaming providers at a time when engagement becomes the most consequential metric due to the adoption of ad-supported models. With soaring production costs of original content and nearly 80 percent overlap of FAST channels across providers, streaming services will need a way to differentiate in 2023 without breaking the bank.

These competitive pressures will increase demand for foreign language content next year and beyond. And not just in the U.S., but in markets worldwide, as younger viewers and sites like TikTok continue normalizing subtitles and dubbed audio in video. Content will be culturally adapted and translated into dozens of languages to engage audiences globally, driving double-digit growth in localization services.

— Teresa Phillips, CEO & Co-Founder, Spherex

A: One of the biggest changes we have seen in entertainment consumption in the past year is the expectation audiences have for global content. With more access than ever before, and with global content becoming far more integrated with local content within platforms, audiences are increasingly refining their expectations for quality. More specifically, the growth in popularity of non-English originals for international audiences has paralleled consumer expectations that higher-quality dubbing and subtitling should be available.

One trend we see emerging focuses on how younger consumers favor dubbing over subtitling because it gives them the ability to ‘watch’ TV while using other devices.

— Simon Constable, SVP Global Language Services, Visual Data

Q: What changes in digital entertainment consumption do you expect to most impact the demand for localization services next year?

A: I recently realized that we hit the 10-year anniversary of the cinema release of Brave in Dolby Atmos in 2012, which was one of the first films to embrace immersive audio. Since then, immersive audio is now everywhere and has expanded in many interesting ways, often in partnership with DEG member companies. For 2023, I am particularly excited about the new frontiers of immersive audio in the automotive space as cars are becoming a setting for premium content experiences. Innovations that allow for precision sound placement mapped for every seat ensure the driver and each passenger can be in a sweet spot for immersive audio listening. In fact, Mercedes, Volvo, Lucid, and several others have already launched or announced cars with Dolby Atmos leveraging this immersive audio ecosystem. While music and podcasts are the primary way consumers can enjoy immersive audio in their cars, audiovisual content will inevitably follow. It’s an exciting time.

— Ron Geller, VP Worldwide Content Relations, Dolby Laboratories
Unlock the Magic of Media Services

Media Services • Distribution • SaaS Tools

Premiere Digital simplifies the complexities of content distribution and supply chain management for hundreds of global content providers and digital platforms. Let Premiere be your trusted distributor and media services solution provider.
**A:** We already know that the fastest growing segment of digital home entertainment is the FAST industry. The last two years has seen the proliferation of thousands of new linear channels here in the U.S., much of it filled with domestic catalog content, and new release domestic content. Now we are seeing a vast number of the platforms turning to foreign, non-English language content. (Who knew that Turkey makes great telenovelas that rival those made in Mexico? Or, that Korea produces exciting “must-see” action and sci-fi content?) The rush is on to license foreign content and bring that into the domestic FAST market in a big way. However, the challenge is that there are simply not enough qualified linguists and voice/dubbing artists to handle both the demand and the downward cost pressure associated with licensing content into the FAST market. Further, the industry is simply not equipped to handle a substantially greater amount of content going from other languages into English, or from one foreign language directly into another foreign language.

— Josh Pine, CRO, XL8

**Q:** How will cloud evolve in the new year to improve efficiencies for entertainment media?

**A:** The adoption of cloud technology is rapidly transforming entertainment media, and this will only accelerate into next year as the cloud provides the ability to de-silo information and increase reporting between systems, enabling the flow of information.

Inherent in making this evolution work will be the creation and adoption of defined standards and schemas to package data and metadata in a way that enables interoperability. Visibility and access will also become a key factor, increasing the importance of having a simple intuitive multi-purpose interface that allows a wide variety of stakeholders across a single organization to access the same content and data in one place, and to surface the specific granular insights they require. The implementation of these foundational systems and processes will allow organizations to harness the power and agility of cloud infrastructure in ways that could be transformative to their businesses.

— Rob Delf, CEO, Fabric

**A:** Cloud is essential to achieving the necessary workflow fluidity to enable faster content creation and distribution. Artificial intelligence (AI) activates this content further to accelerate this process and unlock monetization opportunities. As organizations migrate more of their workflows to the cloud, we’ll see some move their entire workflow process, but many will opt to migrate in a hybrid fashion to maintain past technology investments and reduce the burden of implementing and training staff on new workflows, accelerating operationalization in the short-term. Cloud-based AI solutions that have the flexibility to seamlessly integrate with current technology stacks will rapidly improve efficiencies in content creation, management, and monetization for entertainment media brands.

— Ashley Bailey, Director of Product Marketing, Synthetics and Metaverse, Veritone

**A:** As the whole industry is shifting from CAPEX to OPEX and moving systems from the cellar to the cloud, media companies are increasingly looking to SaaS in their search for more operational flexibility and less upfront investments. They want their operations to be able to deal with uncertainties, fluctuations, and sudden changes, and leverage the fast technological evolutions. Now that they need to reach more audiences through more platforms and business models with less efforts and costs, they are rethinking their content supply chain looking for greater agility, scalability, and efficiency.

The Cloud is the essential enabler of a lean content supply chain that elegantly connects strategic, planning and execution workflows, revolving around one source of truth for the whole operation.

— Rebecca Twardy, Strategic Account Director, Mediagenix
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20K Linguist Talent Pool

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100+ Local Languages

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Q: What is the current or emerging security risk that you see most impacting the digital entertainment business in the new year?

A: While DRM systems use encryption to ensure that digital entertainment is used appropriately, the DRM itself is often a target for attack. Many mobile phones today have vulnerabilities in their software-based DRM systems. In the last 2 years, there have been multiple instances of DRM clients being exploited across different devices to extract content encryption keys. Pirates then use these exploits to steal content encryption keys for illegal usage. Despite DRM providers issuing regular updates to address vulnerabilities, some devices cannot be easily updated because they are either too old or non-tech savvy users don’t update their OS/applications automatically or manually on a regular basis. Today and next year, this remains as the most impacting security risk to the digital entertainment business.

It is therefore imperative for streaming service providers to take matters into their own hands and look to utilize security agents that proactively protect their media applications from attack.

— Rodrigo Fernandes, Product Director OTT, Irdeto

A: While piracy is expected to remain popular, preventable and for the pirates, highly profitable, new risks are also likely to emerge as consumer frustration grows over an increasingly fragmented content landscape. This is likely to lead to the growth of new pirate super-aggregators and increased credential sharing across different apps.

Going beyond more “traditional” forms of piracy, and as new Web3 technologies start to take their first steps in areas such as video gaming and the metaverse, the use of secure digital assets (such as NFTs) will also create new hunting grounds for pirates. Related to this, how consumers interact with the digital economy also presents new security risks – this includes how they pay for, transact with, and enjoy digital entertainment services. With increasing consumer concern about the size of their digital footprint, we expect to see new ways of securing and servicing identity management that decentralizes control and gives the consumer greater confidence through which to manage their highly connected lifestyles.

— Ken Gerstein, VP Sales, NAGRA Anti-Piracy & NexGuard

A: The top security risk I see is piracy of the full content service: using jail broken or rooted devices or similar techniques to steal content providers’ delivery services including their content and their CDN. This means the pirates not only steal the content, but also make the content providers pay for it.

— Jim Turner, VP Product Management, Streaming Platforms, Synamedia

A: From script to screen, the media and entertainment supply chain is a multi-layered matrix of global companies and on-prem, hybrid and cloud-native workflows and applications. Fast-paced change and subsequent restructuring are causing instability, and the potential vulnerabilities throughout the supply chain are varied. Companies that understand this reality have current policies in place, invest in employee education, have deployed tools and processes to continually monitor their environment, and have a regular cadence for risk assessments to keep raising the bar for their own content security and that of their content and technology partners.

Unsurprisingly, a lack of attention and focus on Content Security will continue to pose risks to the digital entertainment business.

— Terri Davies, President, TPN
We help filmmakers and content creators share their stories with the world.
DEG was inspired to start D2CA in 2019 as a way to shift conversation away from the idea of “streaming wars” and emphasize the burgeoning business opportunities available amid a proliferation of ways for consumers to get their TV, filmed, news, sports, and specialty content. That same inspiration is at the root of the Alliance’s recent expansion in two areas of intense business activity and viewer growth in 2022: ad-supported video-on-demand (AVOD) and the move of live sports rights from linear channels to streaming. As consumers continue to cut the cord and yet struggle with cost-efficient ways to access the content they value, including live sports, through a combination of paid and free streaming services, DEG again is positioned ahead of the curve to support industry dialogue, promote the benefits of new business models and delivery platforms, and develop initiatives that are designed to achieve best practices across the industry while delivering the highest quality user experience.

AVOD Innovation Group
First meetings focus on consistency, transparency of measurement

The AVOD Innovation Group, led by IRIS.TV co-founder Field Garthwaite, was formed earlier this year to put a spotlight on the key challenges facing buyers and sellers of OTT video advertising that are coming into sharper focus as AVOD viewership grows. These include planning, targeting, verification and measurement; lack of signal standardization across supply partners; and limited opportunities to address streaming issues. The group’s goal is to bring information to D2C Alliance members and drive industry dialogue around the expanding AVOD landscape.

Measurement quickly emerged as the topic of most interest to D2CA committee members, and the first in a series of presentations was held in August with Nielsen’s Ameneh Atai and Innovid’s Krista Panoff discussing what is changing in the TV and CTV market for measurement; transparency on platforms measurement; and creating unified measurement.

A second discussion on measurement took place in November with the group hearing from Jonathan Bohm from VideoAmp who spoke on redefining measurement for CTV, while Adelaide’s Marc Guldimann addressed the fundamentals of attention measurement in this space.

Upcoming sessions will highlight the differences between AVOD and FAST and Server-Side Ad Insertion (SSAI).—Jean Levicki

AVOD Innovation Group Participants

A+E Networks
AMC Networks
BB Media
BBC Studios
Cinedigm
Fandango
Intel
Microsoft
Omdia
PBS Distribution
Samsung Electronics
Synamedia
The Sherlock Group
Veritone
Vizio
Wondrium
Xperi

Interested teams from all D2C Alliance member companies are invited to attend the AVOD Innovation Group sessions.
Live Sports Council

Group seeks to align messaging, promote consumer benefits

The transition of live sports to OTT has the sports sector facing many of the same consumer issues that the D2C Alliance has been working through with entertainment platforms but heightened by the challenges related to “live” delivery. Among the issues are frustration over service disruptions; confusion over conflicting streaming offers; national vs regional content availability and content restrictions; high subscription costs; and incompatible television operating systems.

To address these concerns DEG is creating a Live Sports Council made up of leading sports streamers. The group’s mission is to identify and promote the benefits associated with live sports streaming and develop initiatives that are designed to achieve best practices across the industry while delivering the highest quality user experience. In September, an initial meeting was hosted at Peacock headquarters at 30 Rock in New York with representatives from Bally Sports, fuboTV, NBC Sports Next, Paramount+, Peacock, Prime Video, The Tennis Channel, Warner Bros. Discovery Sports, and YouTube TV.

Interested participants came together for a follow up meeting in November where it was agreed to pursue DEG’s proposed deliverables: change the conversation around sports streaming from a focus on the business to the benefits to consumers, promote the streaming experience to avid sports fans, align the messaging for all sports programming (DTC, linear and pay TV platforms), and establish key partnerships with leading audiovisual dealers and system integrators. –J.L.
Over many months the D2C Alliance’s TV & Connected Devices committee thoroughly investigated the possibility of conducting a data capture project designed to look at how much time is spent on devices connected to the TV. The goal of the project was to gain insight into where users are (or are not) engaging on platform and devices (e.g., native streaming services, gaming, cable boxes etc.) in order to inform product development around the user experience across media types as well as monetization opportunities. However, due to complexities related to data capture, integrity, and sharing, the concept proved unfeasible.

As a result, the group is pivoting its focus from quantitative device-specific measurement to exploring issues important to the members’ Smart TV OS platforms. The project will concentrate on matters such as improving the quality of AVOD and FAST services, providing access to local content, integrating the use of voice search, the impact of the live sports service apps, and “customizing” the experience.

In November, the committee welcomed its new Chair, Matt Durgin of LG Electronics. Matt, a longtime active member of the group, takes over from Susan Agliata who stepped down following her departure from Samsung. –J.L

Smart TV OS Platforms Top Committee Agenda

D2CA TV & Connected Devices

CHAIR
Matt Durgin
Senior Director, North America Partnerships
LG Electronics

MEMBERS
Michael Gurau
Partner
Altman Solon

Matt Rivet
Director
Altman Solon

Ron Lamprecht
Director Corporate Business Development
Amazon

Peter Choe
CEO
BLUNTN

Elaine Wong
Director Business Development
BLUNTN

Tony Huidor
Chief Technology & Product Officer
Cinedigm

Colin Petrie-Norris
Chief Revenue and Platform Officer, Xuma
Comcast

Joe Alvarez
Technologist
Intel

Rick Hack
Head of Media & Entertainment Partnerships
Intel

Ravindra Velhal
Global Content Strategist
Intel

John Webb
Director of Graphics & AI Marketing
Intel

Field Garthwaite
Co-Founder & CEO
IRIS.TV

Olivia Shin
Chief of Staff
IRIS.TV

Matt Durgin
Senior Director North America Smart TV Partnerships
LG Electronics

Ravindra Velhal
Global Content Strategist
Intel

Field Garthwaite
Co-Founder & CEO
IRIS.TV

Olivia Shin
Chief of Staff
IRIS.TV

Matt Durgin
Senior Director North America Smart TV Partnerships
LG Electronics

Pedro Gutierrez
Business & Marketing Category Lead - Entertainment, Consumer Applications & Advertising
Microsoft

Josh Pine
CFO & CRO
XL8

Ben Maughan
SVP General Manager, Consumer & Stream Platforms
Xperi Holding Corporation

Kris Brown
Head of Sales & Marketing
The Sherlock Company

Chris Tanquary
Senior Director Business Development
VIZIO

Tim Jung
Founder & CEO
XL8

Joe Alvarez
Technologist
Intel

Kris Brown
Head of Sales & Marketing
The Sherlock Company

Chris Tanquary
Senior Director Business Development
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Earlier this year, participating members of the D2C Alliance’s Targeted Services committee set out to identify the challenges to consumer adoption of specialty services. To do so they commissioned DEG member SmithGeiger to field an online community qualitative study looking at why consumers use various streaming services, how services are selected and stacked, and consumer interest in simplicity and control. This work followed the committee’s 2021 quantitative research with SmithGeiger that looked at The Evolution of DTC Viewer Behavior.

The two-week online community was made up of 29 streaming media consumers, all avid streamers subscribing to an average of eight-plus services, with a mix of age, gender, geography and ethnicity.

Results highlighted a selection of reasons for choosing, using or losing streaming services with content strongly at the center of all three. Streamers tend to choose services because they perceive either breadth or depth of content. Content and variety drive usage choices, with viewers generally defaulting to streaming services. And lack of a strong commitment driver is a key contributor to churn.

Other broad findings confirmed that viewers see huge benefits in streaming especially around options, flexibility and lack of commitment; also, budgets matter and bundling is seen as offering simplicity. ~J.L.

D2CA Targeted Services

**CHAIR**
Chima Ogbuokiri
SVP Growth & Partner Marketing & Strategy
AMC Networks

**MEMBERS**
Piper Rosenshein
VP Subscription Video Services (SVOD)
A+E Networks

Matt Rivet
Director
Altman Solon

Tomas Gennari
CEO
BB Media

Maria Laura Ghisiglieri
Global Development & Marketing Director
BB Media

Jazmin Sanes
Manager Marketing & Press
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William Greswell
EVP Digital Strategy
BBC Studios

Peter Choe
CEO
BLINTN

Elaine Wong
Director Business Development
BLINTN

Daniel Schneider
SVP Revenue
Cinedigm

Alex Viglione
Executive Director Partnerships
Cinedigm

Max Einhorn
SVR Acquisitions & Co-Productions
FilmRise

Rebecca Twardy
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Mediagenix

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Sarah Henschel
Principal Analyst, Media Omdia

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Head of Media Sales/Development
Omdia

Andrea Downing
President
PBS Distribution

Matt Dreher
SVP Insights & Analytics
Starz

Kris Brown
Head of Sales & Marketing
The Sherlock Company

Marissa Garcia
Director Partner & Content Marketing
TiVo

Ian McKee
CEO
Vuulr

Cale Pritchett
Chief Marketing Officer
Wondrium
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The D2C Alliance represents the global D2C industry and supports its members to help create a robust marketplace to lead the new era of content consumption. The Steering committee guides the Alliance’s committees as they work to address key goals: collecting and sharing consumer data, understanding consumer motivation and behaviors, and aligning on consumer messaging.

### D2CA Steering Committee

**Chair**

Matt Strauss  
Chairman, Direct-to-Consumer and International  
NBCUniversal

**Members**

Mark Garner  
EVP Content Licensing and Business Development  
A+E Networks

Ron Lamprecht  
Director Corporate Business Development  
Amazon

Mike Pears  
EVP New Platform Sales & GM, North American Distribution  
AMC Networks

Jennie Baird  
EVP & Managing Director, Digital News & Streaming  
BBC Studios

Jonathan Zepp  
Media & Entertainment and XR  
Google

Matt Durgin  
Senior Director North America Smart TV Partnerships  
LG Electronics

Mark Lee  
Head of US Content Business Development  
LG Electronics

Pedro Gutierrez  
Business & Marketing Category Lead - Entertainment, Consumer Applications, and Advertising  
Microsoft

Simon Crownshaw  
Worldwide Strategy Director Media & Entertainment  
Microsoft Azure

Dan Cohen  
Chief Content Licensing Officer  
Paramount Global

Andrea Downing  
President PBS Distribution

Ali Hoffman  
President Domestic Networks STARZ

Adam Lewinson  
[D2CA REP TO DEG BOARD] Chief Content Officer Tubi

Alisa Bowen  
President Disney+ The Walt Disney Company

Bill Neighbors  
Chief Content Officer - DTS | HD Radio | IMAX Enhanced | TiVo  
Xperi Holding Corporation

The Advanced Content Delivery Alliance addresses the advancements in technology to enable improved content delivery and a better consumer experience. The Steering committee sets the agenda for the Alliance’s committees with topics including localization and culturalization, tech/ops, cloud edge computing, 5G, supply chain efficiency, security and piracy.

### ACDA Steering Committee

**Members**

Jude Fitzmorris  
Senior Manager Product and Engineering, Acquisition Technology  
Amazon Prime

Paul Charron  
Operations Program Manager Google

Mark Sgriccia  
SVP Worldwide Content Operations & Strategy  
Lionsgate

Megan Mauck  
VP Global Media Operations  
NBCUniversal

Tony Guarino  
EVP Worldwide Technical Operations  
Paramount

Tom Cotton  
EVP Distribution Content Services Sony Pictures Entertainment

Jim Turner  
VP Product Management, Streaming Platforms Synamedia

Adriana Becerra  
VP Content Operations Tubi

Heather Wells  
Senior Platform Operations Development, Global Content Operations  
The Walt Disney Company

Kejo Swingler  
Senior Director Global Content Servicing & Solutions  
Warner Bros. Discovery

Bill Neighbors  
[ACDA REP TO DEG BOARD] Chief Content Officer - DTS | HD Radio | IMAX Enhanced | TiVo  
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Video-level data tells the whole story.
Localization Committee Mapping Out Specs and Best Practices in Multiple White Papers

The Advanced Content Delivery Alliance committees are putting their efforts toward publishing shared industry resources in a variety of mediums.

The Localization committee works to educate and create awareness around the art and science of localization, develop a common language for defining/describing quality in localization, shape localization standardization, and be the point of reference on localization information for the DEG community.

In 2022 and into 2023, the Localization committee is working to develop a common language for defining quality in localization through the lenses of culture, creative and technical aspects with individual workstreams dedicated to each one.

Spherex’s Teresa Phillips leads the Culturalization, Diversity & Inclusion group, which is working toward delivering a paper on the use of pronouns in gender identity across language. They will develop a short paper discussing the challenge, best practices, and resources for help. There will also be a pronoun glossary for select languages, as well as a template for direction from content owners.

With an assist from DEG member Screen Engine ASI, the Creative Quality group led by BBC’s Vanessa Lecomte, conducted a survey to understand consumers’ viewing habits around dubbed content. The results, part of a broader research initiative to define “What Makes a Good Dub?” are expected to be published in early 2023, along with articles and videos to be published regularly on a variety of topics pertaining to the creative process of localization.

With an assist from DEG member Screen Engine ASI, the Creative Quality group led by BBC’s Vanessa Lecomte, conducted a survey to understand consumers’ viewing habits around dubbed content. The results, part of a broader research initiative to define “What Makes a Good Dub?” are expected to be published in early 2023, along with articles and videos to be published regularly on a variety of topics pertaining to the creative process of localization.

Craig Seidel of Pixelogic has led the Technical group’s white paper on identifying the specifications that determine the quality of localization and it is nearing completion. The paper is under peer review and is expected to be published within the coming months.

There are also two active localization subcommittees:
The Synthetic Media subcommittee concerns itself with digital entertainment uses of AI or machine-generated content including images, video, audio and text. It is well underway on its first deliverable of creating a vocabulary list before it will look at creating a code of conduct and a white paper outlining best practices in synthetic media use.

After a discussion on workflow at an ACDA Steering Committee meeting, the Localization Workflow subcommittee was formed this year as a joint effort between the Supply Chain Efficiency and Security and Localization Committees. The group is mapping out the localization supply chain from vendors’ and content providers’ points of view. –Bekah Sturm

–Bekah Sturm
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ACDA Localization Committee

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Kacy Boccumini
Executive Director Systems & Workflow
Sony Pictures Entertainment

CO-CHAIR
Josh Pine
Chief Revenue Officer
XL8

Chris Carey of Iyuno, the inaugural chair of the committee, recently stepped down after more than a year of distinguished service and is replaced by Kacy Boccumini of Sony Pictures Entertainment and Josh Pine of XL8. DEG is excited to welcome them as committee co-chairs.

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Anuvu

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CEO
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BB Media

Jazmin Sanes
Manager Marketing & Press
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Localization Manager
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Wendy Lee
Chief Operating Officer
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Remote work is an extra challenge that flows throughout the supply chain

The Supply Chain Efficiency & Security committee seeks to address obstructions within workflows due to the narrowing of windows, additional post work required for the digital entertainment window, security challenges, and the threat landscape brought on by pirates. This group also provides leadership to the Digital Supply Chain Alliance and DEG’s annual TechOps Awards. The committee, co-chaired by Paul Charron of Google and Craig Seidel of Pixelogic, currently is putting the focus on its subcommittee created to interpret the 10 principles of MovieLabs’ “2030 Vision.” The 2020 MovieLabs whitepaper, which laid out a bold 10-year vision for the adoption of new technologies to aid in content production, post-production, and visual effects, has now been broadly adopted by many partner companies and is accepted as the industry ‘north star’ for guiding production technologies towards a shared goal. DEG seeks to extend this leadership to the distribution sector, beginning by defining where production ends and distribution begins. Also included in the DEG whitepaper will be sections on security and cloud adoption. DEG aims to help the industry understand that the 2030 Vision envisions an ecosystem with a high degree of collaboration. The ‘2030 Vision’ is not only about how individual companies work, but how they work together. Writing is underway with the hope of publishing in first quarter 2023.

Other SCE&S initiatives include:

- A Security Literacy project is in the process of publishing a series of videos on DEG’s website created by Altman Solon’s Michael Gurau, security expert Matthew Rosenquist, SPE’s Eric Diehl, and Seidel. The videos aim to help educate on why security is important, especially as the industry moves toward cloud-based systems. Additional security resource materials will accompany the videos and should be released in the first quarter.

- A subcommittee has been formed that is dedicated to Updated Spec Review (i.e., MDFF) before they are released, as well as evangelizing the adoption of specs to help standardize the industry. – B.S.
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Operations Program Manager
Google

CO-CHAIR
Craig Seidel
Chief Technology Officer
Pixelogic Media

Charron and Seidel have a strong track record with DEG on enacting standards, evangelizing them, and achieving wide industry adoption.

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Partner
Altman Solon

Derek Powell
Director
Altman Solon

Jude Fitzmorris
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Peter Choe
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Elaine Wong
Director Business Development
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Charlie Ball
Media & Technology Specialist
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SVP Global Product Management
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Manager Technical Operations
Dolby Laboratories

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Austin Lee
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Strategic Account Director
Mediagenix

Warren Bruttell
Content & Product Management
Movies Anywhere

Drew Kutilek
Director Client Engineering (web, iOS, Android, connected TVs)
Movies Anywhere

Eric Van Beek
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Movies Anywhere

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ROW8

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Pete Leone
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Earlier this year the Digital Finance & Accounting Committee (DFAC) relaunched following a drive to recruit finance and accounting representation from DEG’s expanding range of member companies that more than doubled the number of committee members.

At its first meeting the group agreed on a mission to encourage open discussion around industry trends and challenges; provide opportunities for networking and speakers; and leverage shared knowledge to develop best practices for topics of mutual interest. Those topics may include windowing challenges; industry changes (FAST, AVOD, CTV); digital planning technologies; and changes in accounting standards and trends. The committee followed up with two events aligned with their new goals.

Over the summer the committee met to hear a presentation on “Windowing Across Platforms.” Nicole Coleman, SVP, Analytics, Planning and Marketing Operations, at Warner Bros. Discovery shared her thoughts on managing windowing and content valuation as well as looking at the macro picture and trade-off analysis.

In October, DFAC partnered with Media Financial Management (MFM) to host a Digital Finance and Accounting Salon and Networking Reception. The event brought together a panel of industry insiders - (l. to r.) Scott Byrne from EY, Deborah Newman from Grant Thornton, Deloitte’s Ashok Parmar and Point B’s Margarita Lam, with moderator Joseph Annotti of MFM - to share their insights on various issues facing the entertainment industry, including the changing streaming landscape, risk management, blockchain and NFTs. – J.L.

Digital Finance & Accounting Committee

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VP Finance
Paramount Home Entertainment

VICE CHAIR
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SVP Global Transformation & Business Improvement
Whip Media

MEMBERS
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BLUNT

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VP Finance & Accounting
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Ngoc Thai
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Paramount Home Entertainment

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Kim Evangelista
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VIZIO

Clement Bosson
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Walt Disney Company

Christopher Chiaraluce
Disney/ESPN Streaming
Walt Disney Company

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Studio Roundtable Planned for January

With a look toward increasing opportunities for transactional purchases and rentals, a roundtable event “Driving the Transactional Business” is being planned by the Marcom Committee for January. Designed to bring together marketing and commercial team representatives from DEG’s studio members the session will address the state of transactional, marketing to the transactional customer in 2023, opportunities for reaching a younger audience, and creating urgency to spend on transactional. The agenda, currently in development, is intended to offer a mix of speakers and open discussion as well as case studies highlighting new marketing tools, such as podcasts, TikTok, and NFTs, that are delivering successful campaigns across entertainment and other categories. ■ – J.L.

Marcom Committee

MEMBERS
Dana Ortiz
VP Emerging Platforms & Content Licensing
A+E Networks

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SVP Marketing
BBC

Tomás Gennari
CEO
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Kim Staruk
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Erin Carter
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Michelle Vendange
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Sony Pictures Entertainment

Lexine Wong
EVP Worldwide Marketing
Sony Pictures Home Entertainment

Nadia Haney
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Universal Pictures Home Entertainment

Hilary Hoffman
Global EVP Marketing
Universal Pictures Home Entertainment

Lea Porteneuve
SVP Global Publicity & Communications
Universal Pictures Home Entertainment

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Senior Director Content Marketing
VIZIO

Fonda Berosini
Executive Director Communications
Walt Disney Company

Chris Bess
Executive Director Global Publicity & Marketing Communications
Walt Disney Company

Scott Gaudet
VP Partnership and Distribution Marketing
Walt Disney Company

Kristina Fugate
SVP Marketing, Home Entertainment Film Division
Warner Bros. Discovery

Stuart Herriott
VP Partnership and Distribution Marketing
Warner Bros. Discovery

All committees welcome active participation. If you are interested in joining any DEG, D2CA or ACDA committee, please email Jean Levicki (Jean@degonline.org).
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The committee at the start of 2022 began flowing premium release data into the digital data tracker, giving a more accurate picture of industry activity. The committee is scheduled to report full year 2022 digital entertainment data by early February 2023.
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DEG Adds 18 New Members in 2022

DEG in 2022 marked its quarter century with an expanding global membership that includes almost 90 member companies encompassing all areas of the digital entertainment ecosystem. The 18 new member companies added during the year are diverse in their business segments and in their geographic locations. They include, for example, Israel’s Deepdub, a localization service provider; Argentina’s BB Media, a data science company specializing in media and entertainment; South Korea’s Blintn, a global content marketplace; and U.S.-based TreeTrunk, which introduces a new standard for NFTs that enables blockchain royalty collection and distribution.

“I’m delighted that DEG membership is evolving to reflect the increasingly global nature of the digital entertainment ecosystem,” said DEG Chair Dan Cohen, Chief Content Licensing Officer, Paramount Global. “The new Board is committed to serving all DEG members and to providing the membership even more opportunities for collaboration, education and networking across industry sectors and across borders.”

“We welcome all of our new DEG Board Directors and are thrilled about our expanding base of companies based outside the U.S.,” said Amy Jo Smith, DEG President & CEO. “I’m grateful that they see the value of membership in DEG, which is committed to continuing to deliver high return on investment for members evolving into global providers of direct-to-consumer entertainment.”

**AMAZON WEB SERVICES (AWS)** for more than 15 years has been the world’s most comprehensive and broadly adopted cloud offering. AWS now has more than 200 fully featured services for compute, storage, databases, networking, analytics, machine learning and artificial intelligence (AI), Internet of Things (IoT), mobile, security, hybrid, virtual and augmented reality (VR and AR), media, and application development, deployment, and management from 84 Availability Zones within 26 geographic regions, with more Availability Zones and regions on the way. Millions of customers trust AWS to power their infrastructure, become more agile, and lower costs.

**BB MEDIA** is a worldwide, award-winning data science company specializing in media and entertainment for more than 35 years. It accurately measures how markets evolve across formats and displays. Channels, programmers, television providers, online platforms, telecommunications companies, media agencies, advertisers, producers, distributors and copyright associations rely on BB’s information and value-added analysis to make strategic decisions. BB Media has offices in Miami, Bogota, Buenos Aires, Mexico City, and São Paulo.
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**BLINTN** is an online B2B marketplace focused on media rights. From licenses to formats, Blintn’s smart curation engine finds the best match for content sellers and buyers. Blintn – based in Korea, the U.S., and China – provides all the service tools necessary for rights trading to easily maximize the value of content. Blintn makes distribution and acquisition easier and more successful by providing auto-buyer target marketing, a searchable content database, personalized real-time curation, and a deal-making service. Blintn is committed to providing a fair and transparent global marketplace.

**DEEPDUB**’s revolutionary end-to-end localization solution enhances human creativity with artificial intelligence (AI) technology to dramatically improve and simplify content localization productions. Deep dub’s human-AI hybrid workflows allow for improved quality and faster turnaround times on top of cost efficiencies across the entire production process. Deep dub plugs into the postproduction process of content owners and creators, and takes complete ownership of their localization and delivery needs.

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**HDMI LICENSING ADMINISTRATOR, INC. (HDMI LA)** is the agent appointed by the HDMI Forum to license Version 2.1a of the HDMI Specification and is the agent appointed by the HDMI Founders to license earlier HDMI Specifications. HDMI LA provides marketing, promotional, licensing and administrative services.

“Every country has its own patterns and consumption style. When U.S. players want to expand their services into other regions, they really need to understand what is going on. Korea, India, and Japan are growing fast and the audiences there are completely different than in the Americas.”

— Laura Ghisiglieri, Global Development & Market Director, BB Media

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“Piracy in the end-to-end OTT distribution chain is increasing significantly. With rising inflation, and pirated content available at far more affordable prices, it will continue to rise.”

— Shane McCarthy, Chief Operating Officer for Video Entertainment, Irdeto

**Pixelworks** provides industry-leading content creation, video delivery and display processing solutions and technology that enable breakthrough cinematic viewing experiences with superior visual quality, across all screens – from theatrical to home streaming, to mobile and beyond to deliver cinematic high frame rate motion picture content. Its TrueCut Motion technology was chosen by James Cameron for use in re-mastering *Avatar* and *Titanic*. Pixelworks has more than 20 years of history delivering image processing innovation to leading providers of consumer electronics, professional displays and video streaming services.

**Rightline** is a global IP commerce SaaS platform that provides IP owners of all sizes with innovative technology tools to manage and monetize content across the entire intellectual property lifecycle. Serving global companies across media and entertainment, gaming, publishing, consumer products, life sciences, high tech, and more, Rightline gives finance, legal, operations, and strategy teams 360-degree visibility into their content’s rights, royalties, contracts, and additional sales opportunities. Rightline’s customers include Amazon, BBC Studios, Google, IBM, Merck, EA, Hallmark, and other leading global IP holders.

**The Sherlock Company** translates, localizes and delivers creative and marketing assets anywhere, on time and brand-compliant, in any spec or language. Trusted by leading brands in media, tech and healthcare, Sherlock streamlines localization workflows with data-driven precision, using creative-specific automation and metadata tools to do more in less time. Sherlock meticulously localizes more than 100,000 assets monthly, including digital artwork, app screens, 360 advertising campaigns, social video, CRM, educational materials and more. We bring peace of mind to brand perfectionists everywhere by making the industry’s most challenging creative projects our passion.

**Sony Pictures Entertainment** (SPE) is a subsidiary of Tokyo-based Sony Corporation. SPE’s global operations encompass motion picture production, acquisition, and distribution; television production, acquisition, and distribution; television networks; digital content creation and distribution; operation of studio facilities; and development of new entertainment products, services and technologies. SPE’s Motion Picture Group production organizations include Columbia Pictures, Sony Pictures Animation, Screen Gems, TriStar Pictures, 3000 Pictures, Stage 6 Films, AFFIRM Films, and Sony Pictures Classics.
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TUBI, a division of FOX Entertainment, is an ad-supported video-on-demand service with over 48,000 movies and TV shows, including a growing library of Tubi originals, 200+ local and live news, sports and entertainment channels, and 400+ entertainment partners, featuring content from every major Hollywood studio. Tubi is available on Android and iOS mobile devices, Amazon Echo Show, Google Nest Hub Max, Comcast Xfinity X1, Cox Contour, and on OTT devices such as Amazon Fire TV, Vizio TVs, Sony TVs, Samsung TVs, Roku, Apple TV, Chromecast, Android TV, PlayStation 5, Xbox Series X | S, and soon on Hisense TVs globally.

VERITONE is a leader in enterprise artificial intelligence (AI) software and solutions. Serving organizations in both commercial and regulated sectors, Veritone’s software, services, and industry applications accelerate and maximize digital migration, empowering the largest and most recognizable brands in the world to run more efficiently, accelerate decision making and increase profitability. Through professional and managed services, as well as its robust partner ecosystem, Veritone develops and builds AI solutions that solve the problems of today and tomorrow.

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XL8 INC., founded in the heart of Silicon Valley by ex-Google and ex-Apple computer science executives, takes AI machine translation for media content to another level. XL8 has expanded operations through a VC start-up accelerator program and is now independently disrupting the global M&E translation and localization marketplace. XL8’s primary focus includes top LSP’s, RSI’s (Remote Simultaneous Interpreting platforms), live event and broadcast platforms, global film studios, EdTech and addressing the exponential growth of the global direct-to-consumer media.
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LONDON | Described by audience members as ‘the hottest ticket in town’, the 2022 DEG Roadshow here and in Hamburg, Germany in May delivered a packed agenda of the creative and commercial, bursting with insights and ideas. High up on the tenth floor of the NBCUniversal offices in central London, with the spectacular panorama of a sunny London morning, DEG’s Amy Jo Smith (right) delivered a powerful overview of U.S. activity and events, the DEG’s current priorities, and the strength of its committees and its alliances.

Iyuno’s Chris Carey, (above) founding chair of DEG’s ACDA Localization committee, talked the audience through the global changes and challenges in the localization process, and the need to bring localization experts to the creative table earlier in the production process.

Paramount’s Jeremy Enos, (left), chair of DEG’s Performance Reporting committee, delivered a wealth of insights into U.S. and international SVOD penetration, the post-COVID landscape, and opportunities for the transactional category.

XL8’s Janice Pearson (above left), founding chair of DEG’s ACDA Supply Chain Efficiency & Security committee, spoke to the Speed to Market Paradox and an increased piracy landscape.

DEGI CEO Liz Bales (above right).

The British Association for Screen Entertainment (BASE) and DEGI this fall published The Evolution of Home Entertainment Report 2020 – 2025. Insights from the report predict UK category growth of £5.5 billion by 2025. Liz Bales, Chief Executive of BASE & DEGI said: “The evolution of Home Entertainment is in full force and this report is a bold vision of the category’s future.”

To download the full report, including insights from DEG’s Amy Jo Smith, DEG Chair Dan Cohen of Paramount Global, Studio Distribution Services’ Eddie Cunningham, Deluxe’s Cyril Drabinsky and more industry leaders click the cover image.
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Asian Leadership Conference

SEUL, SOUTH KOREA | DEG President & CEO Amy Jo Smith moderated DEG Board Vice Chair Dan Cohen of Paramount Global and CFO Andrea Downing of PBS Distribution in a wide-ranging conversation with the theme Streaming Goes Global: Content and Distribution Trends at the prestigious Asian Leadership Conference here in July. Topics included the increasing globalization of content distribution following the onset of the COVID-19 pandemic, the importance of sports rights in growing direct-to-consumer streaming globally, and the future evolution of streaming business models. Downing predicted further M&A activity in the sector, while Cohen expects further innovation in windowing, citing South Korea as a current innovator in movie distribution.

Salon Culture

Omdia’s Marija Masalskis presented on media and entertainment trends to watch for in 2022 during our first “BLD Hour” research salon of the new year. The series was renamed “BLD Hour” (breakfast, lunch, dinner) to reflect viewership in times zone across the U.S. and beyond.

Looper’s Nelly Voukaki at our BLD hour research salon, where she presented on merchandising highlights for US connected TV devices.

Tobias Queisser of Cinelytic gives an overview of the impact of Windows on top OTT titles during our summer BLD hour research salon.

Tobias Queisser of Cinelytic gives an overview of the impact of Windows on top OTT titles during our summer BLD hour research salon.

DEG Director Adam Lewinson of Tubi (top l.) hosted a discussion with Deadline’s Dade Hayes and Reuters’ Dawn Chmielewski, co-authors of Binge Times: Inside Hollywood’s Furious Battle to Take Down Netflix to share their insights on how Netflix came to dominate the streaming-video market and who might prevail as the battle for streaming supremacy intensifies.
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Polishing Your Personal Brand

Catlin O’Shaughnessy Coffrin of Captivating Co. presented on building your personal brand with passion and authenticity at the Canon Club Spring Salon. At our Fall Salon, professional wardrobe stylist Maria Turkel shared her finest tips for navigating the current the evolving post-pandemic style landscape for business attire at our Canon Club Fall Salon.

Breakfast with the Board series

At right, DEG Board Director Marc Garner of A+E Networks (l.) successfully took breakfast back to in-person with (l. to r.) Veritone’s Pete Leone, Whip Media’s Cory Sher and Spherex’s Davinder Luthra in November in Santa Monica. Still virtual, but DEG Director Bec Heap of Comcast did a great job on engaging members during out first breakfast with a Board Director of 2022 (above).
NOT ALL CREDENTIAL SHARING IS CREATED EQUAL

AND YOUR RESPONSE SHOULDN’T EITHER

With the abundance of streaming services available, casual credential sharing is to be expected. However, given the proper incentives (and disincentives), many consumers are open to pay to access the content they cherish.

Concurrent Stream Management from Irdeto Control gives streaming services the flexibility to create new offerings based on number of users, type of devices, or specific content. Or mix and match to address market needs.

Over 24+ billion user credentials* are circulating on the dark web. Cyber criminals share these with each other and can limit unknown persons reaching their sites by using hidden servers and closed forums on the darknet.

Irdeto Cyber Services infiltrates and monitors hacking and piracy communities. Working together with streaming services we remove stolen credentials from the web, take down illicit services, or disrupt the payment options.

*Account Takeover in 2022, Digital Shadows

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DEGQ 2022

Chris Lang and Dan Reins of SmithGeiger and Chima Ogbuokiri of AMC Networks present at our first DEG Expo of the year, on research findings relating to the evolution of DTC viewer behavior. The study was commissioned by members of DEG’s D2CA Targeted Services committee.

Our spring DEG EXPO saw a panel of experts gather to discuss the opportunities for sports content to thrive in our current landscape, with featured speakers Matt Del Percio (below) of Altman Solon, and (at left) Rob Weisbord of Sinclair Broadcast Group and Adam Deutsch of Deloitte.

In an exclusive salon for DEG Board Directors and other group leaders, Deloitte’s Ira Kalish and The NPD Group’s Don Unser presented a macroeconomic outlook and led an insightful discussion on topics such as consumer psychology, the recessionary outlook, and changing spending habits.

This summer, DEG held a two-part expo series on NFTs and their benefits for the entertainment industry, featuring Joseph Lubin of ConsenSys and Ethereum, Richard Taub of ConsenSys and Tree Trunk, Ira P. Rothken of Rothken Law Firm and Tree Trunk and DEG’s Amy Jo Smith.
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DEG + Media Play News | 40 Under 40 in Home Entertainment

LOS ANGELES | Media Play News and DEG had a perfectly warm, breezy summer evening for the second annual 40 Under 40 in Home Entertainment reception at the Skirball Cultural Center here on August 23. Honorees made the reception family time, bringing partners, parents and friends, as well as colleagues, to celebrate. About 100 guests were in attendance including senior executives from honorees’ companies and the DEG Board.

Members of the DEG board pose with honorees from Media Play News’ 40 Under 40 in Home Entertainment.

Fandango/Vudu’s Cameron Douglas (2nd from l.) with company honorees Shital Vora (l.) and Brianna Walker. Walker celebrated with a bouquet of 40 red roses from partner Dominique Walker (r.).

(above left) Honoree Max Einhorn of FilmRise, accompanied by fiancé Christina Pak.

(above right) Reception sponsor Whip Media’s Saj Jayasinghe (l.), Tracy Akselrud (2nd from r.) and Alex von Krogh (r.) gather around honoree Jaime Otero.

The Warner Bros. Discovery team had much to celebrate with honorees (from l.) Harris Hoffberg, Sarah Bills, Natalia Guzman and Madison Wojciechowski.

DEG President and CEO Amy Jo Smith greets attendees at the reception.

Honorees Emika Kiyozumi and Noah Rooney, both of Redbox.

Honoree Field Garthwaite of IRIS.TV (l.) with friend Anna-Karin Loureiro.

The reception was a family affair for honoree Katherine Pond of Vizio (c.), who was accompanied by husband Chris Pond and mother Lisa Reed.
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The team from XL8 celebrates honoree Jay Jinhyung Park (c.).

The Blu Digital team celebrates honoree George Rausch (holding magazine).

(from l.) DEG Board Director Ron Schwartz of reception sponsor Lionsgate with MPN’s TK Arnold, DEG’s Amy Jo Smith and DEG Chair Emeritus Jim Wuthrich.

Warner Bros. Discovery honoree Madison Wojciechowski with proud dad Mike Wojciechowski.

(above left) Honoree David Sanderson with wife and business partner Catharine Burhenne of Reelgood.

(above right) Honoree Robert Suh (l.) of Universal Pictures and Allan Suh.
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For custom or syndicated research information, contact Mark Orne, EVP, Cross Platform Group, at MOrne@screenengineasi.com.

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A: The continued growth of streaming services is changing consumption of filmed entertainment. Consumers have embraced low-cost or ad-supported streaming services, and are shifting the time spent viewing content from conventional distribution outlets to these services. It’s likely that the various streaming services will forge alliances over the next 24 months, much in the way that Warner Bros./Discovery are combining to offer more content to their subscribers. If that trend continues, streaming services will be stronger and more profitable, likely triggering an even greater shift of content flow to their platforms. This will create even more demand for content, but will likely result in a degradation of content quality while increasing content costs at the same time. Ultimately, the winners are consumers and the content creators, and the losers are the distribution outlets who cling to the old broadcast or theatrical models. —Michael Pachter

Jessica Reif Ehrlich
Managing Director
B of A Securities

This will be the year of dramatic AVOD growth.
—Jessica Reif Ehrlich

Michael Pachter
Managing Director,
Equity Research
Wedbush Securities
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Ultimately, the winners are consumers and the content creators, and the losers are the distribution outlets who cling to the old broadcast or theatrical models
—Michael Pachter
IN THIS SEASON OF PREDICTIONS, DEG went to some of the smartest observers of the digital entertainment transition and asked them just one question – how will entertainment distribution change in the next year or two. Here’s what they said.

**Q:** As Hollywood continues to seek out new ways to deliver well-told stories to consumers, how will the entertainment distribution landscape change over the next 24 months and what will be the most significant forces in reshaping it?

**A:** The decline of linear TV will accelerate. Media companies are putting all of their best TV shows onto streaming services, giving viewers little reason to watch cable other than sports and breaking news. And as sports leagues such as the NFL and NBA put more of their matches on streaming, the appeal of the bundle will decrease even more. These streaming services will consolidate, reducing the number of places customers need to go for different shows. They will also find ways to bundle or sell one another collectively. It’s not clear exactly how this will work, but Amazon, Alphabet and Apple are already trying it. Forcing people

—Continued on 115