

Issue #1

# M&E Spotlight

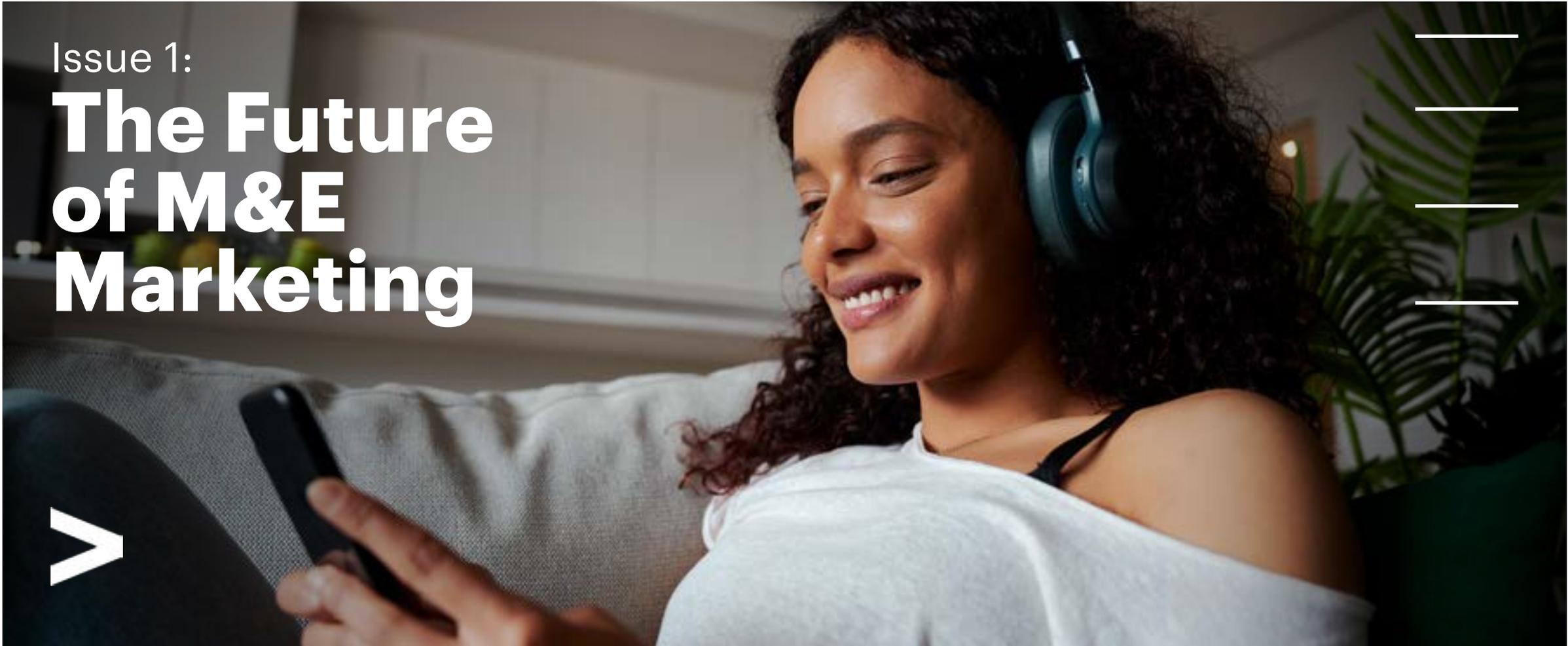
Trends and insights shaping the world of Media & Entertainment



Part of  
Accenture's  
continuing Media  
& Entertainment  
Trends series

Issue 1:

## The Future of M&E Marketing





**Shifting consumer expectations, the global pandemic, and rapidly-evolving technologies have accelerated direct-to-consumer competition for media companies. In the battle for viewership, tomorrow's winners will create and leverage trusted customer relationships to offer an engaging content library through a seamless user experience.**

More than ever, marketing organizations are positioned to lead their companies to growth. To be successful, marketers must be unapologetic in rethinking the customer journey, organizational structure, and ways of working.

The opportunities are endless.

**The time is now.**



# The great burnout

The boundaries between so many aspects of life—especially our personal and professional lives—have blurred during the pandemic.

**So much change so fast  
has been exhausting.**

# 70%

Nearly 70% of marketing executives say that the past year has completely exhausted their employees.

# How is marketing changing?

We surveyed over 1,000 senior marketing executives across industries and countries to learn how marketing is changing and what leaders expect for the future.

**We found a small group—just 17%—whose marketing organizations are thriving despite all the change and complexity.**

**We call them Thrivers.**



# 86%

of these select marketing executives say their employees are energized by a new purpose of servicing customers' rapidly changing motivations.

# Marketing in media trends

## Hard pivot to streaming



The pandemic has accelerated cord-cutting and traditional media is seeing a drastic decline.

As media itself migrates to more digital methods, the marketing of media has also become more reliant on digital channels.

Marketing operations must adopt hybrid strategies to address streaming and Pay-TV business models as well as traditional models.

## Death of cookies



Due to increased pressure for data privacy, the way data is being collected, stored and used is dramatically evolving.

Gathering, synthesizing and leveraging first-party data will be the most effective way to target consumers.

Marketing spend will increase 10-20% to reach customers outside of a walled garden.

## Rise of new empires



As technology drives fragmentation, the need for scale drives re-aggregation across brands.

Bundling is getting increasingly complicated and competitive.

With over 300 individual SVOD platforms in the US alone, volume and quantity are often at odds as companies race to build content libraries.

## Battle for engagement



As subscriber growth reaches a plateau, the fight for engagement increases.

The shift towards interactive media creates a new target.

Microcommunities are making huge impacts on consumers and helping brands build stronger engagement.

## Scaling at the speed of light



The streaming total addressable market is now defined by global scale.

There is an increased focus on AVOD models to achieve higher returns.

# Impacts to marketing organizations

## Hard pivot to streaming



Digital transformations will be attempted with legacy technology, teams, and data.

The increased pressure to generate ROI may result in rushed marketing strategies.

The ability to measure business results for emerging platforms and digital campaigns will require new analytical tools and methods.

## Death of cookies



Without clear KPIs and data transparency, the efficacy of campaigns will be difficult to measure.

Investments in audience modelling capabilities will be necessary to target consumers.

New data compliance standards will need to emerge for AVOD platforms.

## Rise of new empires



Mergers create integration challenges between traditional and data-driven D2C marketers.

Bundles can create brand confusion and make it difficult to properly segment consumers.

## Battle for engagement



Content volume and personalization is required to turn subscriber growth into engagement with advanced media mix and propensity modeling.

Marketers should explore and test brand-appropriate opportunities with emerging platforms and technologies, i.e. metaverses, NFTs, etc.

## Scaling at the speed of light



Need for content release strategies that are simultaneous, coordinated, global and multi-channel.

A comprehensive data and analytics strategy will be required to scale and differentiate AVOD without cannibalizing SVOD.



# The **Thrivers** difference:

We've identified five areas of focus for media marketing leaders seeking to dive into the future of marketing:

- 01** Connect the fragmented experience
- 02** Focus on customer lifetime value
- 03** Optimize for time spent
- 04** Rediscover your purpose
- 05** Embrace dynamism

 *We'll explore each of these tenants in depth in our upcoming issues of M&E Spotlight.*

01

# Connect the fragmented experience

As media companies pivot to focus on direct-to-consumer and digital channels, customers notice and react to disjointed experiences.

Tomorrow's leaders will provide a **seamless, single voice** experience that **aligns to the personal brands** of their most-profitable customers.



*Join us as we explore this area of focus in depth in Issue 2 of our M&E Spotlight series.*



02

## Focus on customer lifetime value

Engaging directly with end customers empowers media companies to measure customer lifetime value for the first time.

Leaders recognize that measuring success as customer lifetime value **will increase the revenues and profitability contributed by each customer.**



*Join us as we explore this area of focus in depth in Issue 3 of our M&E Spotlight series.*



03

## Optimize for time spent

With access to more content than ever before, consumers are picking winners and losers by allocating eyeshare to their preferred platforms.

To become the signal in the noise, leaders will deliver the **most-engaging content** through an **enjoyable platform experience across all channels 24 hours a day.**



*Join us as we explore this area of focus in depth in Issue 4 of our M&E Spotlight series.*



04

## Rediscover your purpose

Responding to complete industry disruption in step change fashion will not move the needle. Simply put, it's time to transform.

Leaders are unapologetic in identifying and focusing on their **brand's purpose**: they **discard tired ways of working** and **rewire to deliver customer value**.



*Join us as we explore this area of focus in depth in Issue 5 of our M&E Spotlight series.*



05

## Embrace dynamism

As consumers' expectations continue to be fluid, brands that can't adjust quickly will find themselves continually one step behind.

Leaders' paths to success will be grounded in **flexible technologies**, a **culture of experimentation** and a **fail fast, move forward mentality**.



*Join us as we explore this area of focus in depth in Issue 6 of our M&E Spotlight series.*



# Benefits for media marketing teams



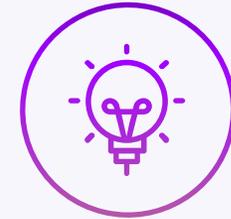
## Increased efficiency

as automation and trusted partners enable today's team to handle future scale through agile ways of working.



## 360° view of the customer

as observed behaviors become actionable data used to measure and increase the lifetime value of each customer.



## Measurable ROI

as marketing's impacts are tracked and foundational to strategic content and channel decisions.



## LESS

Mass Advertising

Manual Insourcing

Tactical Execution



## ENABLES

Precision Targeting

Quality at Scale

Strategic Value



## MORE

Audience of One

Automation & Outsourcing

Strategic Orchestration

# Benefits for media marketing teams and the company overall

**A more-impactful, more-strategic role for the marketing team** as focus shifts from 70% transactional operations to 70% advisory/analytical workload with minimal time spent on non-strategic task management.

<b>Creative &amp; content marketing</b> From Mass Production to Strategic Oversight	<b>Performance marketing</b> From Sidelines to Center Stage	<b>Public relations</b> From Brand Protector to Brand Shaper	<b>Research</b> From Data Historian to Mad Scientist	<b>Media</b> From Cost per Spot to Return on Investment
<ul style="list-style-type: none"> <li>• Additional time to focus on setting the strategy and creative vision for campaigns.</li> <li>• Ability to scale with title counts through managing the quality of creative assets delivered by trusted partners.</li> <li>• Improved confidence in attribution metrics from running experiments and measuring results.</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger influence on business decisions by sharing an enriched data set.</li> <li>• Increased input into campaign strategy and design based on observed user behaviors.</li> <li>• Unlocked potential to combine owned data sets with third-party data to create a holistic view of consumers.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased responsibility for shaping and guiding the public's perception of the brand.</li> <li>• Deeper engagement with end customers to shepherd the end-to-end customer journey.</li> <li>• Strengthened communications to consumers through a unified, consistent voice of the brand.</li> </ul>	<ul style="list-style-type: none"> <li>• Less time spent measuring past performance and more time spent predicting future results.</li> <li>• Deeper engagement across marketing as the core champion of the experimentation mindset.</li> <li>• Richer understanding of rapidly-changing consumer expectations from improved technologies and data sets.</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on a subset of the advertising mix to drive the greatest return from the most-strategic ad buys.</li> <li>• Decreased per-spot costs through bundled scale provided by trusted partners.</li> <li>• The ability to accurately measure the impact of advertising campaigns to inform future operations.</li> </ul>

# Benefits for media marketing teams and the company overall

**Marketing's role as the driver of growth will impact all functions of the company,** as improved data sets and deeper customer relationships empower marketing to serve as a strategic advisor to the rest of the business.

## A view of the customer

through rapid analytics that project a holistic profile of the customer to inform development and rights acquisition.



**Development**



**Consumer products**

## Accurate forecasts

that maximize licensing revenues by informing product teams of which goods to deliver through which channels at any point in time.

## Title release strategies

that find the sweet spot between the lowest ad spend to reach the greatest number of eyeballs, all with a personalized touch.



**Distribution**



**Finance**

## Customer lifetime value

becomes the driver of maximized shareholder return with the support of marketing's rich data sets and deep customer relationships.

# About the authors



## **John Peters**

Managing Director & Lead,  
Media & Entertainment

John supports growth strategy and technology-led innovation across distribution, digital supply chain, finance, marketing and production.



## **Greg Jensen**

Managing Director,  
Media & Entertainment

For over 10 years, Greg has helped many of the world's most-recognized media brands imagine and deliver transformational business results.



## **Sarah Alebachew**

Senior Manager,  
Media & Entertainment

Sarah helps clients across the media and entertainment industry develop world-class experiences and solve complex business challenges.

## About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services—all powered by the world’s largest network of Advanced Technology and Intelligent Operations centers. Our 699,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities. Visit us at [accenture.com](https://www.accenture.com).

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## About M&E Spotlight

M&E Spotlight is our bi-monthly digital magazine that puts game-changing media and entertainment perspectives in the spotlight. It combines thought-provoking content and insights, to keep you on top of what’s new in our industry.

Featuring different business leaders and diverse views, be inspired, explore the latest trends, tools, technologies, and ignite your industry interest with transformational thought leadership.