



THE CLOUD IMPERATIVE FOR THE MEDIA INDUSTRY



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EXECUTIVE SUMMARY

If there's a poster child for disruption, it's the media industry.

For years, traditional media companies have watched technology-driven new entrants roll out innovative new business models and content enthusiastically embraced by consumers. Making matters worse, these entrants also attracted advertising dollars, eating into media companies' primary revenue stream. The fact is, media companies today find themselves at a crossroads, and it's "sink or swim" for many of them.

What's the answer?

It's time for a complete transformation of the media business—from one that's focused primarily on content, to one that embraces technology as the foundation of their business. It's a transformation from a media business to a "media-tech" company, and it's the future for media companies that want to thrive today and in the future.

Playing a starring role in the shift to media-tech is the cloud. The cloud can help enable the media-tech company to innovate and scale with low-leverage cost structures. Media-tech will create capabilities that leverage cloud and cloud-native technology to provide a new level of geometric scalability (both up and down) and a flexible, low-leverage cost model (based on pay-for-use).

With the cloud at their core, media houses can revamp their operating structures, infusing agile, continuous improvement and "right-sizing" into their technology decisions and broader culture. They can also manage content supply and production activities with a remote workforce, which media companies urgently need. With access to collaborative, state-of-the-art environments with cost aligned to projects, cloud-based workflows help enable creative, high-quality, and cost-efficient content production.

A holistic and unified view of the content supply chain across all parts of the business enables media companies to increasingly activate cloud-based workflows. These can help deliver scalability, speed, reliability, and full cost transparency to help production and publishing teams deliver a seamless and highly collaborative experience.

In short, while content is still king, the cloud is the future of the modern competitive media-tech enterprise, enabling the companies to harness native cloud technologies such as AI content deep tagging that can dramatically improve content acquisition, content discovery, and personalization. And the sooner media companies embrace the cloud, the quicker they can develop the capabilities they need to keep pace with disruptors—and even do some disrupting of their own.

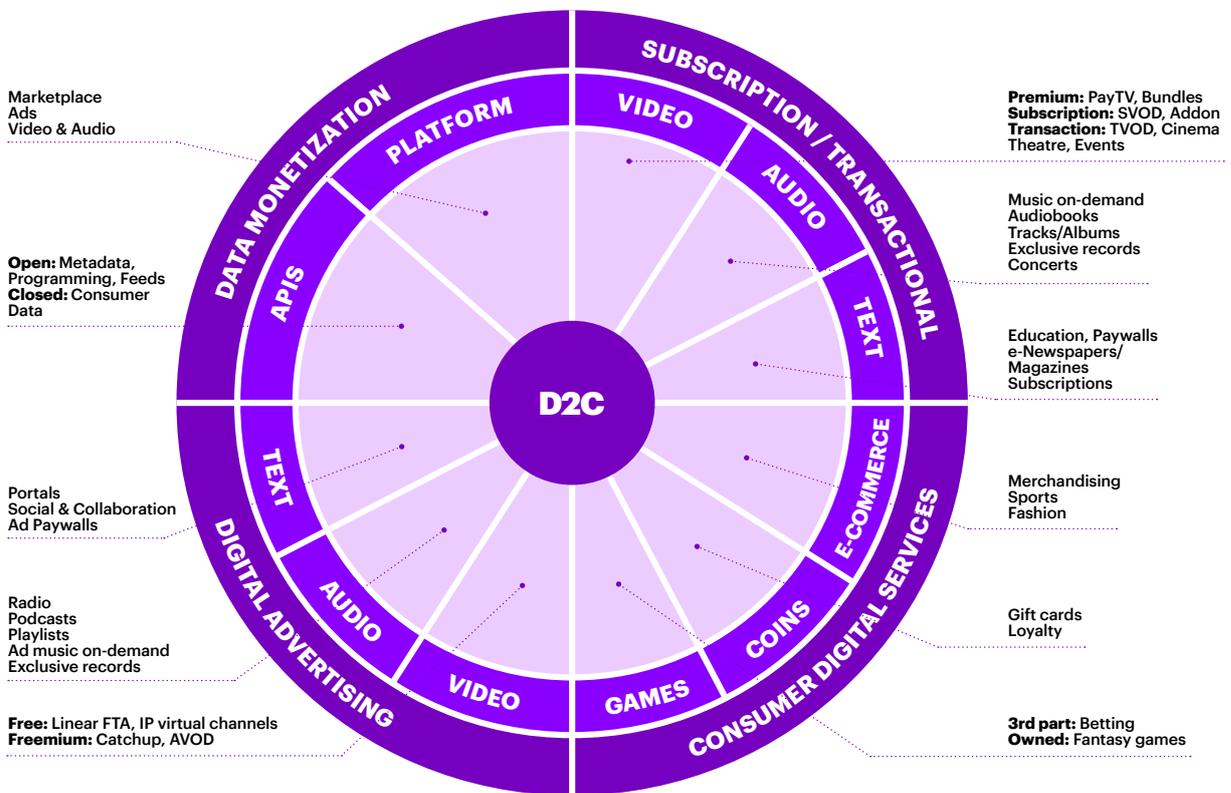
INDUSTRY CONTEXT

It's no secret the media industry has been massively disrupted. Media was one of the early industries to be affected by digital natives such as Google, Facebook, and Netflix, and has seen tremendous change in the past decade. Today's uncertain environment has only accelerated the need for traditional media organizations to think and act differently. They've embraced strategies to help stave off encroachment of new entrants—including offering content in partnership with "super platforms", as such creating adjacent businesses to expand beyond content, and offering direct-to-consumer streaming products.

Of all the growth strategies media companies have pursued, arguably the most important has been delivering content direct to consumers (D2C) over the top (OTT)—for example, as Disney does with Disney+ and NBCU with Peacock. Four business models form the foundation of the D2C strategy (Figure 1):

- Data Monetization**—Allowing external partners (such as telcos, devices, and super platforms) access to consumer usage data
- Digital Advertising**—Selling multiplatform, omnichannel, intelligent advertising
- Subscription/Transactional**—Enabling consumers to buy direct access to content
- Consumer Digital Services**—Providing value-added services to consumers, such as games, gift cards, or ecommerce/merchandising

Figure 1. The four business models comprising media companies' D2C strategy



This new D2C strategy focuses on leveraging the core content—video and data—to extend consumer engagement across a broad set of new domains. It covers all content types (text, audio, and image); services (commerce, gaming, betting, and experiences); and genres (sports, entertainment, news, and kids)—each monetized through multiple business and revenue models (subscription, ads, and transactions) and available across all devices, anywhere, anytime.

In a D2C strategy, content alone is no longer the source of competitive advantage—Content+Tech (defined as data + experience + variable flexible revenue models) is. This strategy stands on three fundamental pillars: **a.** Cloud and Ecosystem **b.** Modern tech capability or Media-tech and powers a shift in the operating model and powers **c.** a shift in the operating model.

D2C requires horizontal scale and scalability, which is something traditional media doesn't have—their scale is dictated by channels on distribution, while studios and production facilities scale on creation. The cloud provides horizontal scale and scalability, critical as the focus shifts from audience to consumer, with individualized and personalized offers across all services.

The other key driver of this new strategy—modern technology capability—is no longer a business enabler, but a deep source of competitive advantage through the development of powerful IP that creates product differentiation (product = content + experience + data + technology + business model). This shift effectively transforms a traditional media company into a “media-tech” company.

Figure 2. Pillars of a D2C strategy

Content, Experience, Technology, Business Model



Pillar 1:

A media-tech organization that powers innovation at scale and speed with a new value equation shared with the business.

Media-tech enables a company to design, build, launch, and measure new digital products and services together with the business (*not for the business*). It provides a methodology built on transparency of spend and return (i.e., the “velocity of value”), which helps the business make quick decisions about effectiveness or efficiency, iterative design, user testing, and production that’s fast to market and focused on continuous feedback loops. The technology approach leverages continuous innovation that is data-driven from the inside and outside, creating and managing an ecosystem of aligned partners; and that uses platforms that enable the ecosystem to build and deliver new experiences and business models.

Pillar 2:

Cloud-based technologies and ecosystems of aligned partners that enable the media-tech company to innovate and scale with low-leverage cost structures.

Media-tech will create capabilities that leverage the cloud and cloud-native technology to provide a new level of geometric scalability (both up and down) and a flexible, low-leverage cost model (based on pay-for-use). It will require media companies to develop anchor partnerships with one or more of the digital platform giants that can contribute proven scalable cloud technology with access to a wide range of digital technologies (such as artificial intelligence (AI), machine learning and data processing) that media companies need to build the platform solutions that are critical to their transformation.

Pillar 3:

An integrated operating model that, while supporting the consolidation of the existing businesses, powers the D2C business.

This operating model shifts the cultural paradigm within the company and drives new skills, a new talent agenda, and a diverse and digitally-savvy workforce. A new integrated operating model enables the execution of the D2C strategy and related business models that ensure the business's relevance and sustainability. This operating model redefines the core capabilities that can drive competitive advantage in the future and is based on five key principles:

Customer centricity—in B2C, evolving models from audience building to customer insights and optimizing lifetime value; and in B2B, addressing advertiser needs

Business agility—gaining the flexibility to explore, pivot, and scale new business models through experimentation

Digital relevance—enabling both IT and the business to provide inputs into strategic planning and decisions

Talent—teaming the right skill set and process with a lean product management capability to build and release products

Operational scalability and efficiency—achieving operational leverage and continuously optimizing non-strategic, horizontal capabilities.

With the cloud at their core, media houses can revamp their operating structures, infusing agile, continuous improvement and “right-sizing” into their technology decisions and broader culture. They can also manage content supply and production activities with a remote workforce, which media companies urgently need. With access to collaborative, state-of-the-art environments with cost aligned to projects, cloud-based workflows help enable creative, high-quality, and cost-efficient content production.

Finally, with a holistic and unified view of the content supply chain across all parts of the business, media companies can increasingly activate cloud-based workflows that deliver scalability, speed, reliability, and full cost transparency to help production and publishing teams deliver a seamless and highly collaborative experience.

THE STATE OF CLOUD IN THE MEDIA INDUSTRY

Although the media industry was one of the first to be disrupted by cloud-based new entrants, traditional media companies have been slower than many others to embrace the cloud. Initially, media companies used the cloud primarily for transcoding and basic collaboration and didn't extend it to all parts of the supply chain and operations. The reasons for this varied.

In the early days, the cloud lacked readily available core media processes, and total cost of ownership (TCO) and availability were concerns. Many media chief technical officers (CTOs) felt that limited cloud coverage and inconsistent network connectivity made the cloud suited to only non-critical, low-latency activities. While media companies used cloud storage primarily as a disaster recovery archive, they avoided using the cloud for pre-release content due to a lack of security and insurance requirements to keep content in-house. Furthermore, traditional media was mostly hardware, not software-driven at that time, and that hardware was thought best to be housed on premises to ensure business resilience (especially for Linear TV functions like PCR, MCR, and playout). And even if they wanted to take greater advantage of the cloud, media organizations didn't have enough in-house talent with the requisite cloud skills.

Today, however, everything is different.

Advancements in cloud technology have made even resource-intensive activities seamless, and all critical media-specific solutions are now available as out-of-the-box functionalities. For instance, AWS Media Services make it easy to build reliable, broadcast-quality video workflows in the cloud, creating media suitable for streaming, both live and on-demand, and optimized for viewers' playback devices. Additionally, cloud-based, AI-powered metadata tagging and content discovery solutions can create an optimal, personalized viewer experience, providing better in-context ad placements and helping consumers easily discover the content they prefer.

The economics of the cloud have also continued to grow more compelling, with the cloud's elastic and on-demand capabilities (e.g., storage, compute, AI, data, and infrastructure) enabling media companies to significantly reduce CAPEX and IT TCO. And by supporting the creation of open platforms, the cloud allows ecosystem partners spread across the globe to easily co-create content and distribute it on the platform with no time lag.

Perhaps the biggest change has been a mindset shift among CTOs who, with the passage of time and the use of the cloud in some business-critical functions, have become more confident in the cloud's abilities.

The upshot is that a growing number of big media players have overcome their initial reluctance, and are beginning to consider the use of the cloud in the supply chain and operations. One such company is Opus Post Production, a large post-production house, which was able to quickly shift more than 100 creative professionals engaged in offline, online, color grading, and sound design to working remotely.¹ By investing in cloud-based editing capabilities prior to the onset of the COVID-19 crisis, Opus could spin up fully remote operations to keep productions going strong. Walt Disney Television migrated its media supply chain to the cloud to provision and scale resources automatically for linear broadcast and video-on-demand (VOD) content, digital MVPD distribution, and syndication.²

¹ www.avid.com ² aws.amazon.com

THE VALUE CASE FOR CLOUD NOW

As with all industries, the COVID-19 crisis has had a major impact on media, creating significant opportunities masked as challenges for media companies' supply chain and operations (Figure 3). For instance, during shelter-in-place restrictions, media consumption soared but media houses had to concurrently suspend production and post-production operations. The result? A major dent in the supply of new programming. Furthermore, COVID-19's major impact on many industries created a domino effect that's put premium ad inventory at risk, resulting in a hit to media companies' foundational revenues.

Figure 3: COVID-19's impact on media companies

COVID-19 has challenged the media industry on supply and demand factors triggering the need to rapidly adjust to a new operational environment

B2B & B2C



SUPPLY

Decline in supply and delivery speed of new programming & advertising creatives

Reduced supply of live-action television and theatrical content releases

Nominal supply of live events due to safety regulations and public lockdowns

Greater supply of news & informational content across channels and devices

Expansion of video-on-demand release windows and back-catalog supply

Growth in supply of educational/learning content and gaming services

Experimentation in theatrical release window (e.g., same day release & stream)



OPERATIONS

Workforce disruption and virtualization

- Challenges in maintaining on-site workforce
- Virtual client interactions for advertising sales and operations
- Remote working for production crews and broadcast operations personnel

Suspension of live production & events

- Halts to scripted content and live sports productions; closure of theme parks
- Suspension of in-person audiences for televised events

Delays in new content & service launches

- Movie & programming delays due to lockouts
- New service launches, including streaming, delayed due to collaboration challenges

Production & distribution innovation

- Rise in non-traditional filming and live streaming production sets, content, etc.
- Expanded distribution channels, including social and direct-to-consumer



DEMAND

Deteriorating demand for advertising, with premium ad inventory at risk

Reduced demand for production and advertising creative services

Negligible demand from film exhibitors & events producers due to closures

Escalating demand in media content consumption per individual

Rising demand for educational content and digital learning

Decline in demand for 'experiential' offerings (e.g. theme parks, movies)

Increased demand for digital gaming, both console & casual games

B2B

B2C

COVID-19 has also opened the eyes of CTOs from leading media companies about the advantages of technology broadly, and the cloud specifically. In Accenture-led virtual forums, CTOs said the pandemic has led to a greater appreciation for the cloud's importance and what it can do for their business. Specifically, CTOs realized:

- They need to incorporate remote working as a fundamental concept within content production and operations systems (like editing, audio mixing, etc.) securely accessible anytime, anywhere. This is significant, as media workforces will likely be spending significant time working away from the office in the medium- to long-term and, thus embrace the cloud for remote operations.
- Functions that were enabled on the cloud (such as news gathering) were less impacted by new restrictions than those that were not cloud enabled (such as playout), which had to implement stopgap measures.
- Flexibility and scalability provided by on-the-fly provisioning via the serverless cloud can help them ramp up for increased content volumes.
- Internal factories and a modern workforce can bring agility to implementing technology changes as the ways of working have changed for most of content production and delivery in the medium to long-term.

Some COVID-19-related challenges have further accelerated both the need to adopt the cloud and cloud-native technologies as well as a number of trends that have been unfolding across the media industry. In doing so, COVID-19 has created a greater sense of urgency to embrace the cloud to enable:



Remote creative workforce.

Media companies that had invested in remote production capabilities prior to the onset of the COVID-19 crisis were able to easily make the shift to fully remote operations, thus keeping their production activities afloat. Such capabilities will continue to be important to enable remote working for production crews (audio mixing, video editing, and finishing) and broadcast operations personnel (scheduling, production, and master control room activities). For instance, One Dub from Deluxe is a cutting-edge, cloud-based remote audio recording and dubbing solution that enables voice actors and technicians to perform voiceovers and audio editing activities without having to gather in one place.*



Virtual production and distribution.

In the past several years, the media industry has experienced a rise in non-traditional filming, live streaming content from makeshift production sets, and expanding distribution channels that include social and direct-to-consumer. Luma Pictures, for example, used Google cloud for creating visual effects for “Spider-Man: Far from Home” and was able to reduce the rendering time by over 70 percent for certain scenes.**

* www.bydeluxe.com ** cloud.google.com



Collaboration for distributed teams.

With work becoming more distributed, it's critical for media companies to be able to facilitate virtual interactions and streamline workflows for creative activities involving teams in remote locations. Doing so enables companies to get live feedback and quickly prototype new ideas while also improving productivity. Walt Disney Studios has done just that: The media giant uses Microsoft Azure cloud-based workflows to accelerate its innovation cycle and scale resources up and down as needed, which significantly boosts efficiency and dramatically reduces costs.**



Harnessing of ecosystems.

Media companies are unlocking value by playing new roles in an agile, digitally enabled ecosystem, which helps them keep pace with consumer demands and innovate on content creation/sourcing and distribution operations. Furthermore, by enabling an “open API economy” and control points, media organizations can unlock many new and significant monetization opportunities. For instance, Indian ride-sharing service Ola has built the “world’s first connected car platform for the ride-sharing world,” according to the company’s CEO, using a vast network of hardware, software, and content partners.³ Airlines’ in-flight entertainment systems are also now powered by content from various OTT providers and studios.

Media companies can capitalize on these and other key industry trends by using the cloud to create an intelligent supply chain through which they can manage their end-to-end content workflows—from content creation and processing to distribution and the customer experience. In the process, they can gain greater operational efficiency, produce more robust creative, and accelerate time to market.

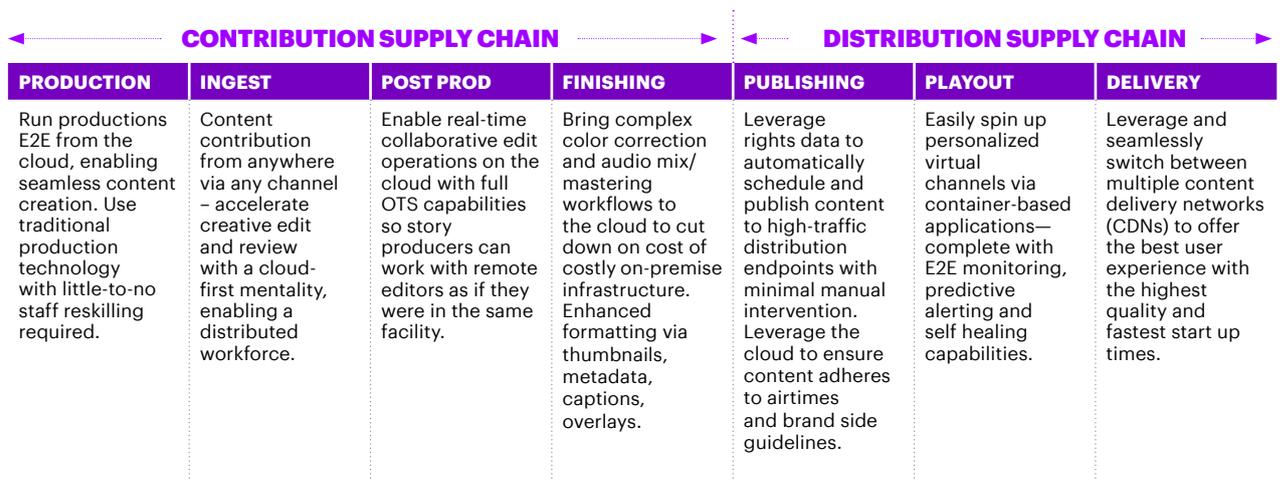
** news.microsoft.com

³ www.forbes.com

However, although many media companies have already moved their OTT content delivery systems to the cloud, along with related critical processes, media asset management, post production, and other supply chain activities are still on-premise. This leaves the content supply chain highly susceptible to disruptions and with a legacy technical debt burden that grows every day. But the time is right for this to change. Media companies now can and should work toward cloudifying their end-to-end content supply chain—across their contribution and distribution lifecycles (Figure 4). Here are four key reasons why:

Figure 4: The cloudification of the contribution and distribution supply chains

Cloudification - Supply Chain



CONTENT HUB—CLOUD PRODUCTION ASSET MANAGEMENT

The mover and shaker of your cloud operations. A central intelligence layer for managing media assets, aggregating and curating descriptive metadata, tracking important IDs, and triggering automation to push productions through the supply chain. Create work orders, generate distribution assets, fulfil avails, and send media to deep archive when the supply chain areas are spokes into a strong cloud hub.



CENTRAL COLLABORATION AND RESOURCE MANAGEMENT TOOLS

End-to-end project management and collaboration tools to manage a title's lifecycle from production to distribution between various milestones and deliverables. Custom-built for coordinated delivery of entertainment content between internal and external stakeholders, taking into account various workflow dependencies. Conducts an audit of production resources across business units to collate operator, equipment, and facility usage to maximize production capabilities.



ADVANCED ANALYTICS & DATA MANAGEMENT

Apply advanced analytics tools to aggregate and proactively manage data throughout the production lifecycle. Identify areas of optimization to streamline production and supply chain processes, enabling customized, seamless playout experiences.

Cloud-native technologies

Among the many cloud-native technologies, AI has been one of the quickest to mature. As mentioned, the availability of cloud-based services with pre-packaged AI capabilities makes it easier for media companies to incorporate them across different aspects of the business. Media companies can use AI throughout their supply chain to automate operations, drive human operator decision making, and provide personalized customer experiences (Figure 5).

Figure 5: A variety of cases for AI across the content supply chain

Key AI, ML use cases across the value chain

	CONTENT CREATION				CONTENT DISTRIBUTION				
	CONTENT PRODUCTION	ACQUISITION & RIGHTS	PLANNING & SCHEDULING	CONTENT PROCESSING	PROMOS & MERCH	ADSALES	PLAYOUT	MARKETING	SALES & CUSTOMER SUPPORT
Solutions	Planning script execution is time consuming.	Manual contract entry.	Accurate forecasting of content.	Content delivered is of poor quality.	Business led promo & merch planning.	Predicting content performance is difficult.	24/7 monitoring is manual and labour intensive.	Disjointed marketing channel inventory planning and strategy.	Lack of transparency of NBA (Next Best Action) based on customers' behavior.
	Accurate prediction of script value is difficult.	Inefficient rights management. Rights as a supply chain bottleneck.	Manual scheduling of content. Cross channel optimization.	On-prem hardware restricts growth. Thousands of custom workflows.	Difficult to personalize due to manual workloads	Developing accurate customer segments to align advertising.	Playout fixes upstream issues.	Conflicting content vs commercial.	
Challenges	Script optimization.	Translating contracts into systems.	ML performance forecasting.	Auto QA & quality prediction.	Auto promo scheduling.	Tailoring adverts to a specific household/ individual.	Automated monitoring and alerting.	Moving from business led to customer led 'planning'—automated and personalized and aligned to content plans	Auto NBA.
	Live events optimization.	Contract management.	Automated scheduling.	E2E workflow automation.	Personalized promo & merch delivery.	Machine learning for audience forecasting.	Blackout prediction models.		Hyper segmentation and personalized offers.
	Production planning & optimization.	To make decisions on content to acquire based on data.	Plan optimization.	Cloud-based transcode and processing.	A/B merch testing.				E2E customer lifecycle management

Geometric scale

The cloud enables media companies to quickly roll out new services, which has become a key competitive lever for industry players. Some media companies today are leveraging the cloud's scalability and elasticity for content processing—to accelerate compute-heavy workloads like visual effects rendering with services to ingest, encode/transcode, render, and deliver content. Highly scalable and secure on-demand services help accelerate content production and reduce workflow intervals by processing large content files and formats in the cloud. The cloud also provides the flexibility to virtually enable workforces. For instance, content production crews can remotely handle edit, finish, program control room functions (namely, switching), audio mix, master control room operations, scheduling, and playout covering both canned content and live events like sports.

API economy

Re-architecting applications with a “cloud-first” and open API mindset helps to drive ongoing service innovation and monetization through agile development, iterative experimentation, and a culture that celebrates “fail fast, fail cheap, and move on.” The media-tech that powers the D2C strategy enables companies to rapidly pilot and experiment with different types of services to test their potential to engage consumers and drive revenues—without putting significant investment at risk while setting the stage for monetization by industrializing successful experiments.

Anchor partnerships

As media organizations adopt new services and business models, anchoring partnerships with multiple platforms becomes key. The cloud is a major enabler in fostering and driving open partner ecosystem onboarding new services at speed.

Beyond the media supply chain, there are compelling arguments for further deploying the cloud across media companies’ front and back offices. For instance, the recent disruption due to COVID-19 exposed vulnerabilities in many media companies’ customer support capabilities, such as order handling, customer interaction, and problem resolution—which affect overall quality of service, a key driver of customer loyalty. The cloud enables media companies to, with the click of a button, create digital front and back offices by deploying a wide range of smart enterprise solutions:

- Enterprise Service Management can help media companies realize tangible, front-of-the-house digital transformation in areas such as customer and employee experience, and re-invent core operating models by structuring, visualizing, and automating service delivery across the enterprise.
- Human Capital Management (HCM) can digitally transform HR and provide an agile approach to HCM technology selection.
- Customer Relationship Management can help media companies earn customers for life by engaging and resolving customer issues regardless of channel, reducing time to resolution, using customer insight to determine the next-best action to drive customer satisfaction, and optimizing customer service team performance.
- Financial Management help enable media companies to rethink the finance operating mission and model to achieve greater efficiency through relentless automation, predict the future with better information, and influence the enterprise’s strategic business outcomes.
- Enterprise Asset Management and Internet of Things (IoT) help give media companies the ability to optimize asset performance, operational efficiency, and maintenance worker productivity.

The cloud can become the technological backbone of traditional media companies, helping them accelerate their digital transformation as they strive to adapt and respond to ongoing changes in the industry, market, and customer landscapes—all while continuing their push for more efficient, cost-effective operations.

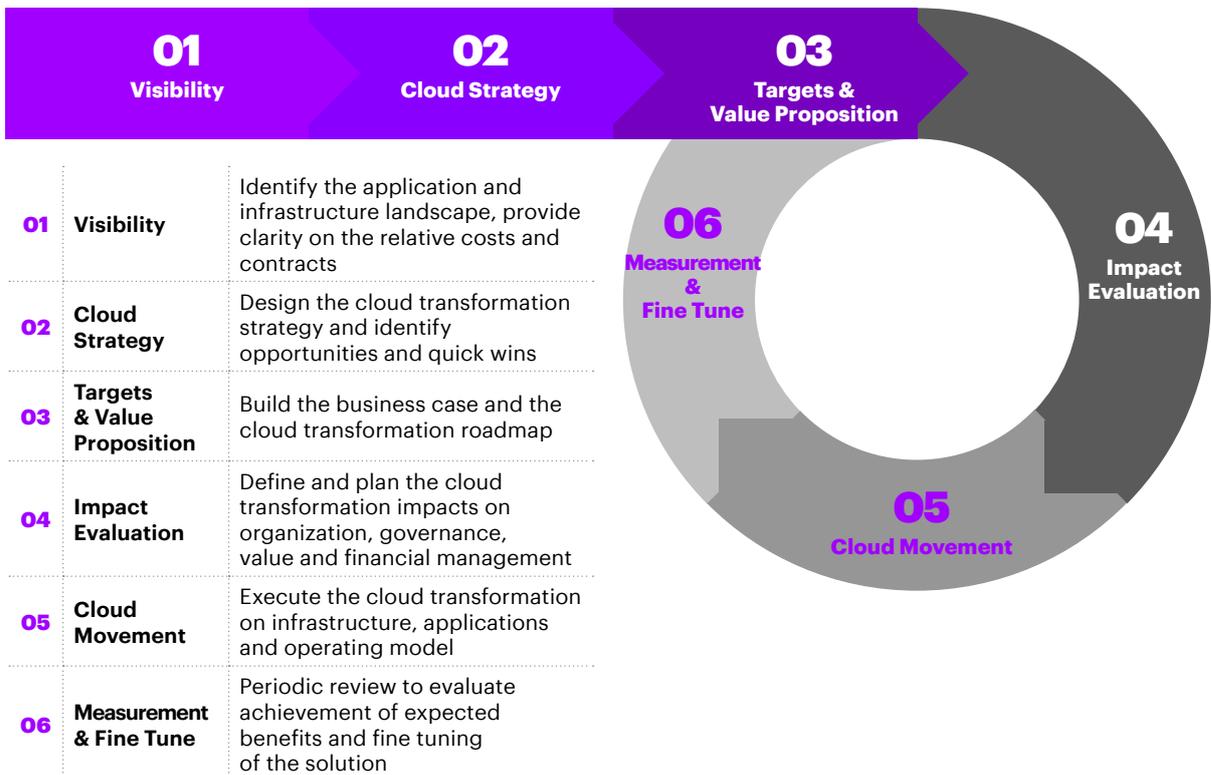
MOVING TO ACTION

For any established company, the journey to the cloud is neither easy nor quick. It includes many, many moving parts and, because it touches all areas of the business, requires careful planning and execution to minimize disruptions. Particularly important, before any workflow is moved or created, is developing a comprehensive cloud strategy that clearly lays out the opportunities a company wants to capture; assessing the existing application landscape and future-state workflows and architecture; and building a rock-solid business case, new operating model, and detailed road map for the journey.

A framework such as the one Accenture has developed (Figure 6) can be useful in providing high-level guidance for the overall effort.

Figure 6. Accenture’s framework for a closed-loop approach to moving to the cloud

Our Closed Loop approach drives maximized benefit and accelerated transformation



One of the biggest initial questions media companies have to answer when moving to the cloud is, “Which workflows do I target, and when?” The answer truly matters.

Companies must first target foundational building blocks that require the least amount of effort so they can build confidence and demonstrate early results that foster buy-in from the larger enterprise. For instance, a multi-tiered cloud archive with media asset management is the foundation on which media workflows of varying complexity can be built. But in pursuing basic building blocks, it's also important to emphasize efforts that will generate enough value and impact to be worth the effort and get stakeholder's attention.

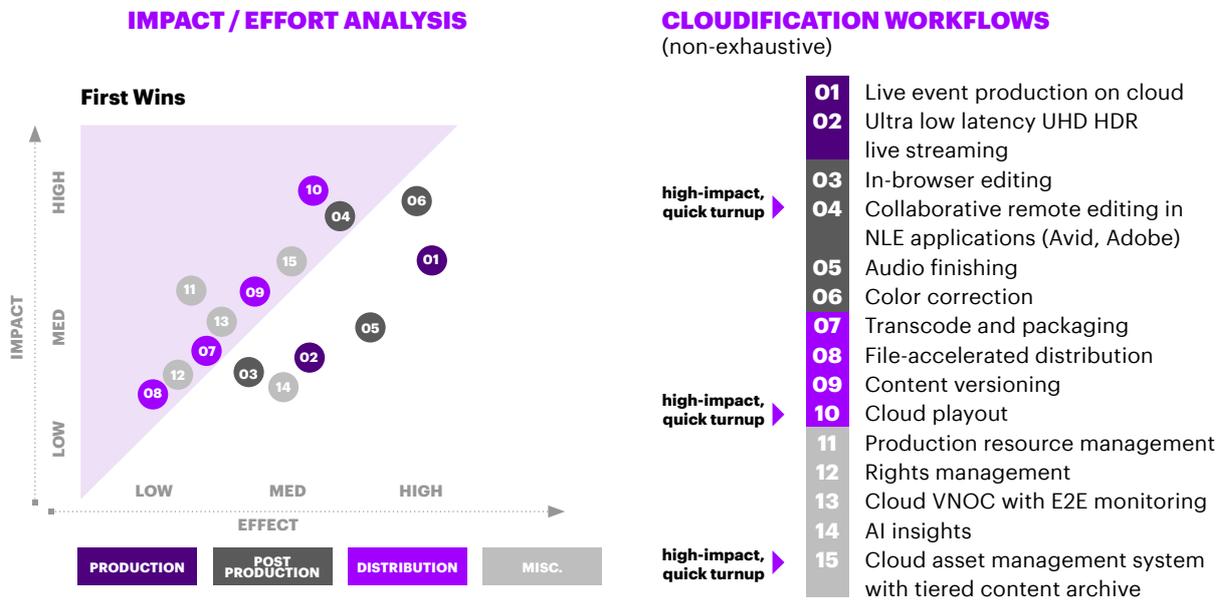
Right-sizing the cloud for specific media workflows to drive cost efficiency is another key consideration—for instance, using open-source FFMpeg in the cloud for low-value transcoding, like proxy generation versus using COTs encoders like Elemental or Vantage for high-priority, high-quality tasks.

Accenture has developed a simple matrix that can help media companies strike that important balance by identifying the key “first wins” in their journey to move the content supply chain to the cloud. As illustrated in Figure 7, target workflows requiring the least amount of effort while still generating a desirable return typically include file-accelerated distribution, rights management, transcode and packaging, and production resource management. These are generally among the first workflows for media companies to move to the cloud. Medium-effort workflows, which should be next, are cloud VNOC with robust monitoring and content versioning.

First-win workflows requiring the heaviest lifting include cloud playout and collaborative remote editing in NLE applications. While these are among the workflows generating the biggest impact, companies can find jumping straight to them without first taking care of the lower-hanging fruit can be a mistake. Starting small can help companies' staff cut their teeth on simpler cloud workflows, enabling them to develop the confidence and competence to take on bigger, more complex efforts.

Figure 7. Supply chain cloudification—finding the sweet spot between effort and impact

Strategically prioritize transformation activities by identifying high impact workflows



We can help with the **business case** for cloudification of a workflow, estimating impact and effort, value and ROI

We can help with the critical task of transforming the **operating model** to align with a workflow in the cloud

It's not easy for traditional media companies to win in today's media environment.

Innovative competitors continue to set and raise the bar for what's possible. Consumers, spoiled by these and other digital innovators, constantly demand more—more content, more access, more flexibility, more compelling experiences. With their legacy capabilities, especially in the content supply chain, traditional companies struggle to keep pace.

Their shift to incorporate a direct-to-consumer model is a big step in the right direction. But traditional media companies also need more. They need to provide new interactive ways for consumers to engage with content, manage content supply and production activities more effectively and remotely, and become more agile and scale quickly to bring more tech-driven innovation to the market faster. Cloud technology can make all that possible. With a holistic view of the content supply chain, organizations can create cloud-based synchronized workflows that deliver scalability, speed, reliability, and cost efficiency—while maximizing the use of existing assets for vital, uniform workflows and supporting collaborative, remote creative by content production teams.

As executives know, change is relentless in the media industry, and the companies that can't adapt won't survive. The cloud is the great equalizer, and media companies need to fully embrace it. Their future depends on it.

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