



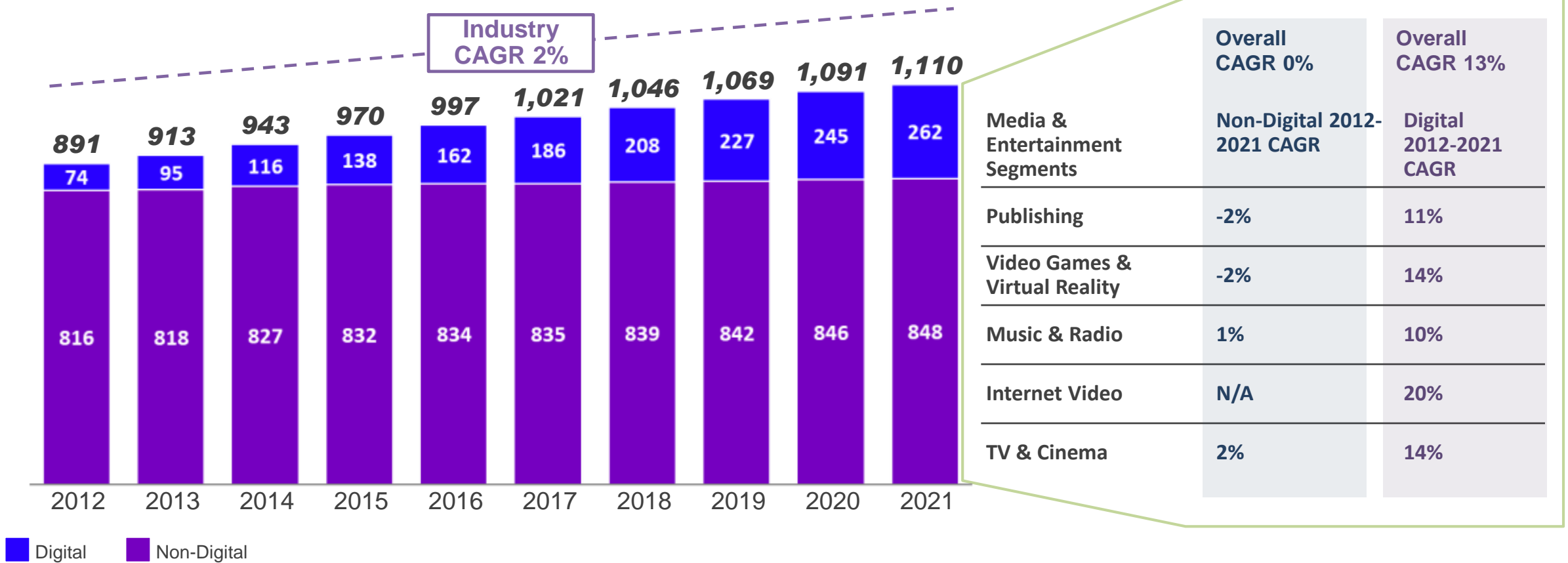
The New Era of Broadcasting is here

by Roman Magis, Accenture & Board member of SACIA

Digital Content VS Non-Digital Content Revenue Patterns

Non-Digital Revenues are on a decline, while Digital Revenue shows 10-20% growth, Internet Video being the greatest contributor, followed by TV & Cinema.

Global Media & Entertainment Industry Revenues 2012-2021, (\$BN)



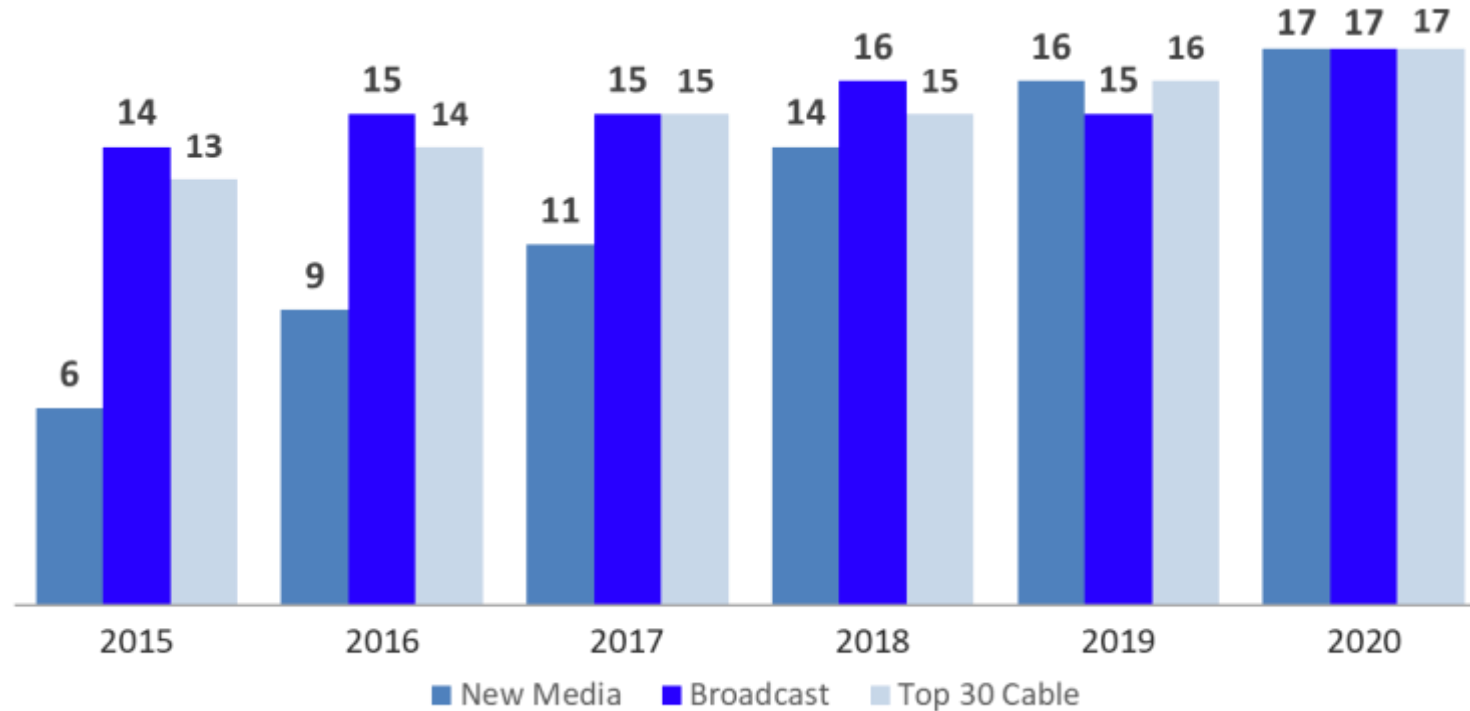
Source: PWC Media Outlook 2017

Library competition: Change in the content spending landscape

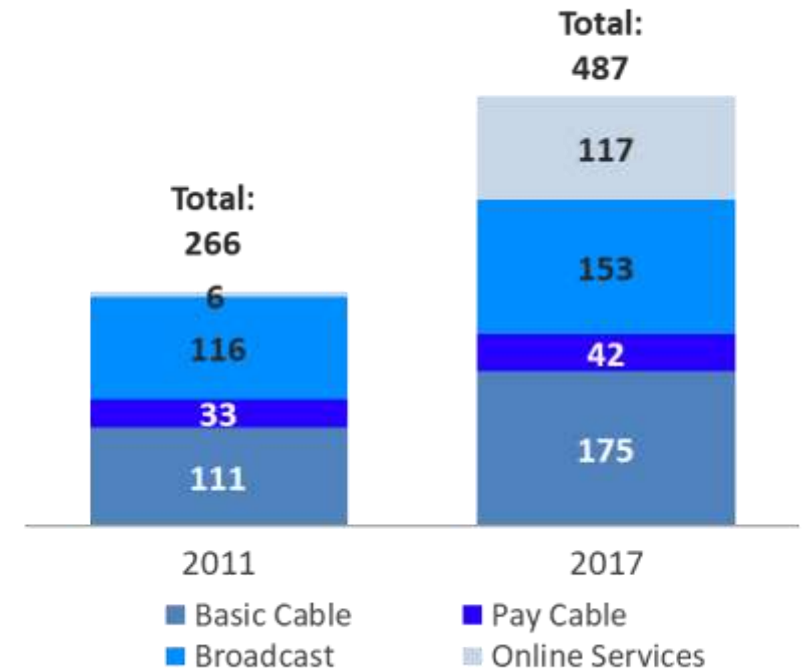
There's a trend of increased investments on Libraries as the New Media companies drive the competition

New media companies are expected to outspend U.S. based traditional networks by 2020

Programming Spend Broken Out by Year 2015-2020, in USD Billion



Original content volume is growing at CAGR of 11% per year
of Originals 2011 v. 2017, # of shows



Notes: New Media consists of Amazon, Hulu, Netflix; Top 30 Basic Cable Networks by Programming Spend (Excluding Sports genre)
Source: SNL Kagan, Accenture Research, FX Research

Volume/cost of storage and archiving in Broadcasting Industry



The broadcasting industry is expected to **consume US\$10.8 billion** worth of **storage infrastructure by 2020**, according to Coughlin Associates Research. This is expected to grow at a CAGR of 14.5% (2014-20) from \$4.8 billion in 2014



During the period 2014-2020, it is estimated that there will be **4.9 X increase in the required digital storage capacity** used in the entertainment industry and about a 3.7 X increase in storage capacity shipped per year (from 18,050 PB to 66,291 PB)



In 2014, it is estimated that **48.6% of the total storage media capacity** shipped for all the digital entertainment content segments **was in HDDs** with digital tape at 40.1%, 10.7% optical discs and flash at 0.6%. By 2020 tape has been reduced to 30.9%, **HDDs shipped capacity is 58.8%**, optical disc capacity is down to about 9.3% and flash capacity percentage is at 0.9%

Digital Archiving – Storage Demands



In 2014, archiving and preservation is estimated to have been 45% of the total storage revenue, followed by **post-production (26%)**, content distribution (25%), and content acquisition (4%). In 2020, the projected revenue distribution is 37% archiving and preservation, **34% post-production**, 26% content distribution, and 3% content acquisition



The greatest storage capacity demand is for **digital conversion and preservation** as well as archiving of new content, followed by content distribution and post-production



Over 60 Exabytes of new digital storage will be used for digital archiving and content conversion and preservation by 2020

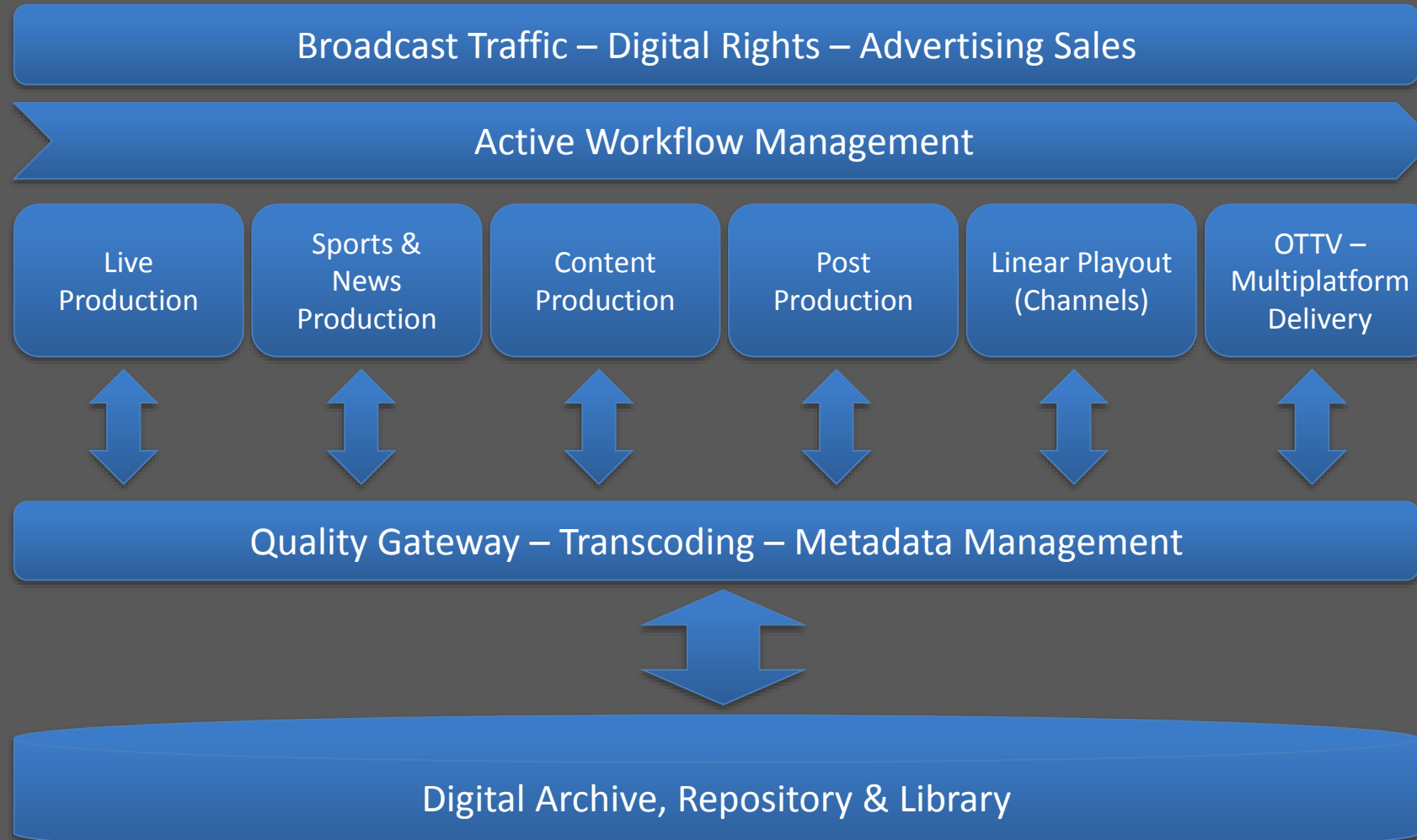


Active archiving will drive increased use of HDD storage for “archiving” applications, supplementing tape for long term archives



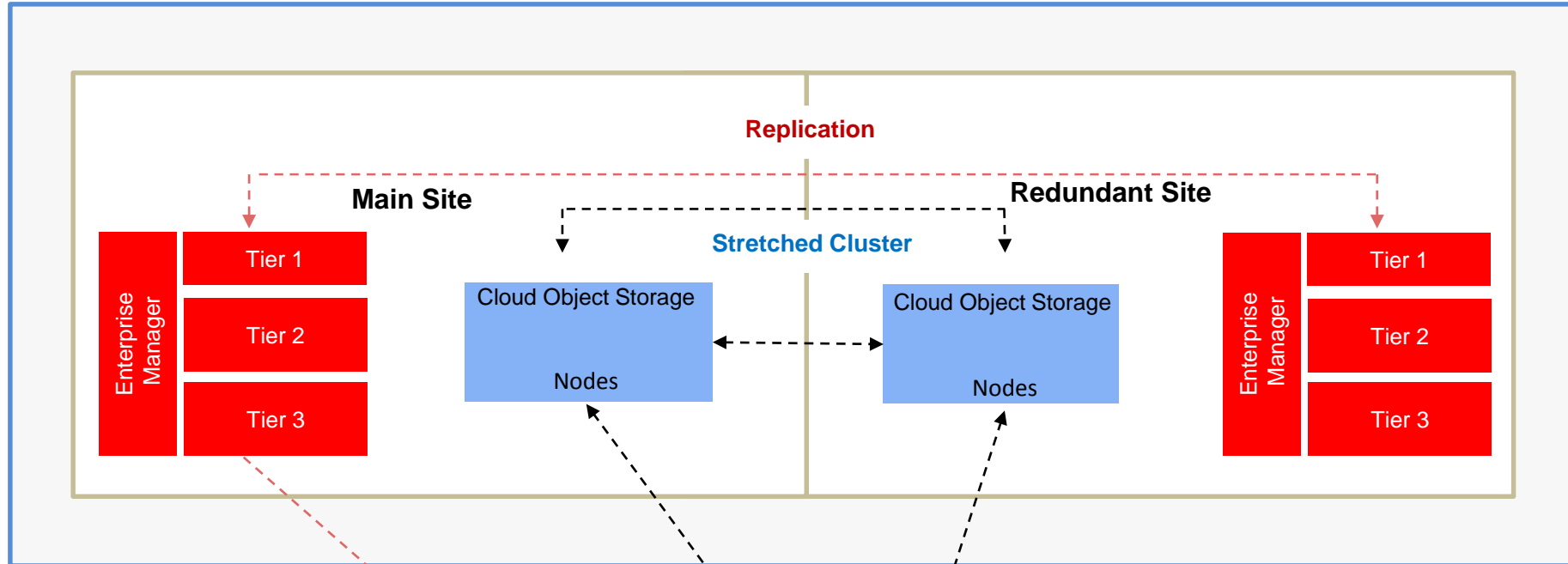
Storage in remote “clouds” is playing an important role in enabling collaborative workflows. **Overall cloud storage for media and entertainment is expected to grow 24 X** between 2014 and 2020 (**763 PB to 18,224 PB**). Cloud storage revenue will exceed \$2.1 B by 2020

The Digital Archive is the Heart of the Digital Media Enterprise!

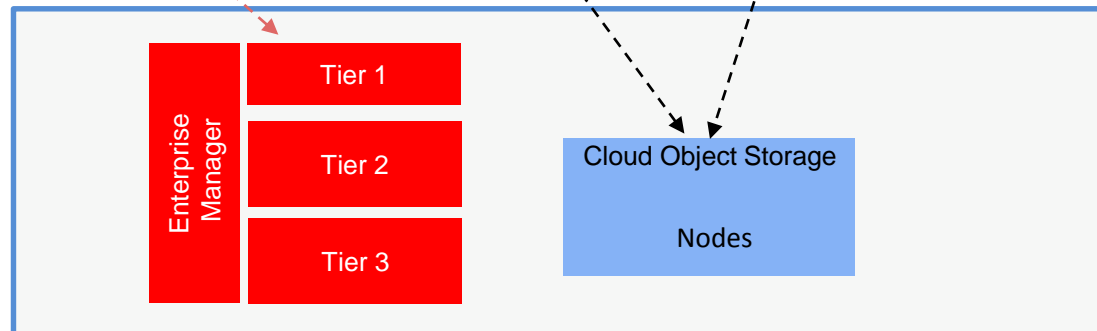


Digital Archive Site map

Twin Data Centre Complex



Disaster Recovery Site / Cloud



Single instance of the data stored across the three Data Centers providing both redundant and DR access to the data.

The Digital Archive is the Heart of the Digital Enterprise!

The increasing number of new age broadcasting channels and digital content producers are forcing the native broadcast & cable companies to go through a digital transformation, in order to ensure efficiency and relevance in the market.

A smart Digital Archive is key for next generation Broadcasters & Content Producers.

