

2022 KEY TRENDS

A hand is holding a tablet that displays a grid of content and media logos. The logos include Star Trek, National Geographic, and One Strange Rock. The background of the entire image is a blurred portrait of a person's face, overlaid with a dark, semi-transparent filter.

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CONTENT & MEDIA

The key trends in the Content & Media industry for 2022.



INTRODUCTION

As we enter 2022, we have collated the key trends in the Content & Media space for 2022.

We're thrilled to have been able to collaborate on this ebook with some of the brightest minds in the Content & Media industry.

Some of the trends range from diversity & inclusion to end-user consumption through to verticalizaion of content.

We are humbled to have been joined by experts and leaders from Deltatre, Sky, Rise and RaceTech to name a few.

Thank you to all our guest contributors, and we hope you find the insights in this ebook valuable for you and your teams.

All the best,

neuco's Content & Media team



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COMPETITION AND DIVERSIFICATION WITHIN THE STREAMING SPACE

The streaming industry is 'going to the moon' as the cool kids say, and there's no sign of that slowing down. We think as we enter 2022 we're likely to see even more 're-inventing' from the streaming providers that are currently in the market and even more niche offerings arriving into the market.

Continual change in consumer behaviours will keep the marketing and the content creators on the edge of their seats, engaged with their users and always innovating and finding new ways to compete.



CRAIG HARVEY

VP APAC, DELTATRE

I think the key trend we'll see is more consolidation in major media organisations as they fight to own the biggest catalogue and secure global eyeballs.

But in parallel, I see a trend of niche OTT platforms appearing, that have identified a 'space' they can own, and launch a service that can cater to that specific target audience tastes in a way that the larger platforms cannot.

COMPETITION AND DIVERSIFICATION WITHIN THE STREAMING SPACE



DAMIEN MONTESSUIT

SENIOR VICE PRESIDENT, MEDIAKIND

In recent years, Operators and Broadcasters have been in a highly reactive mode, constrained by a lack of alignment between their short-term incentives and long-term goals. It's a period defined by baby steps. Now, with multiple concurrent disruptions – Cloud, IP, Media Supply Change, D2C, Ad market shifts, and significant generational changes in consumer viewing behavior – they are being forced to react dramatically, rethinking the types of services they offer and how.

For over a decade, Operators have been focusing on competing head-to-head with OTT services and content brands instead of claiming their rightful place as a trusted aggregator of convenience. Why try to be Netflix when subscribers look to you primarily for Live TV? Why try to own content exclusively or break down a la carte as a differentiator when aggregation and subscriber relationship are your actual superpowers?.

“In 2022 we’re likely to see more ‘re-inventing’ from streaming providers.”

COMPETITION AND DIVERSIFICATION WITHIN THE STREAMING SPACE

As the market saturates with new streaming services launching all the time, the early promise of “all the content you want under one roof for one monthly subscription” is long gone and consumers are left with a choice between many smaller pools of content each with their own subscription cost, and those costs add up quickly for the content hungry consumer.

In such an environment it's becoming harder to operate a successful streaming service and the ones who survive may well be the ones who can successfully band together as aggregated services to better compete with the big boys. Who knows, perhaps long term we will see a reversal of the explosive fragmentation of streaming content reverse and end up with 2 or 3 large, aggregated service rivals competing with one another?



ANDY HOOPER

VP PRODUCT MANAGEMENT, B2B AT AGILE
CONTENT

We're likely to see the continued displacement of traditional video distributors in favour of direct-to-consumer streaming services, and the associated squeezing of margins in the video business of those distributors as content costs go up and subscriber numbers stay flat. Those distributors who succeed longer term will be the ones who work out how to join forces to deploy 'distributor friendly' aggregation platforms.

MOVING THE LAST OF THE LEGACY PRODUCTS TO THE CLOUD

It's 2022, and everything is stored on the cloud. OK, maybe not everything but we're getting there. We think next year will bring about a change for those broadcasts who have legacy systems to bring everything onto the cloud.

With the more efficient timings for turning things on and scaling quickly, it can only be a win for those who have been waiting for a reason to change. Throw in the ability to be a lot faster to market with content it can only be a win for an industry, and we might see those who dwell on this decision left in the smoke.



DARREN LONG

GROUP OPERATIONS TRANSFORMATION
DESIGN CT&I, SKY

In 2022 moving legacy on-prem software and Hardware to the cloud and changing the workforce to adapt and change to this new agile way of working in the Broadcast media world. I.e Sky Glass or Sky Over IP will be a major theme.

The exciting opportunity now is only limited by our imagination of what we can do. Whereas before, it was very limited on our sort of technical capabilities.

I think several things have played a part in the last couple of years, which is, and is, you know, that perfect storm that, in some respects have come together, which is the ability to push content now into Cloud.

Which two years ago, everyone was very reticent to do because obviously everyone thought, you know, we'll lose that content and equally, we'll lose our opportunities to broadcast to our customers.

VERTICALIZATION OF CONTENT

It's true that attention spans have shortened as we've entered the 21st century, but here at neuco we're wondering if that's true? Do we have shorter attention spans, or just more niche interests?

If you look at long form content, books are just as popular as ever, podcasts are taking off and people are still happy to invest hours into series on Netflix.

We think that people are becoming much more selective on what they give their attention to, and to keep up broadcasters are going to need to be tuned in to the needs of their audiences. They're quick to judge, and even quicker to switch off. We expect 2022 to be the year of more verticalization of content, with even more niche content appearing.



NIELS DAALHUIZEN

CHIEF PRODUCT OFFICER, XITE

The further “verticalisation” of content providers/service providers will be one of the key trends for 2022 - i.e. all major players will start offering hardware + software + content + service and (apart from Apple) everyone will have an offer combining advertising- and subscription-based products. That will require/result in further consolidation in the media ecosystem as major players will complement their existing platform/service offering with that of smaller players.

VERTICALIZATION OF CONTENT



SRINI KA

CO-FOUNDER OF AMAGI

in 2022 we are going to see more advances in the streaming ecosystem with personalized linear content taking center stage. Insights on consumer preferences combined with advances in automation is going to enable content owners and platforms to stitch together a highly customized programming strategy (including tailored content and ads) catering to the growing preference for linear TV-like viewing experience among audiences.

“Expect 2022 to be the year of more verticalization of content, with even more niche content appearing.”

DIVERSITY AND INCLUSION

Diversity and Inclusion is of course a topic that all industries should be taking seriously. In 2022 we're likely to see more focus on reflecting the nations that broadcasters are making their programmes for being a massive focus.

With companies such as BBC, Comcast, Sky, and ITV all implementing plans to create more diversity and inclusion we're likely to see others following suit early in 2022.

Of course, we'll be watching on as these plans unfold, and expect to see some drastic changes in the industry in 2022.



CARRIE WOOTTEN

MANAGING DIRECTOR, RISE

Something that has been discussed widely across the sector, specifically over the last 2 years, is diversity and inclusion. I don't see this trend dissipating at all in 2022. In fact I see it as a growing focus and priority, as the demand for achieving a diverse workforce becomes more imperative. I think there will be calls to understand the impact of companies' initiatives and their programmes of support, and that these will be analysed in detail, as we look to see concrete change across the sector.

ENDER-USER CONSUMPTION

It's no secret that consumption of content has changed over the last 2 years, with most of us being locked down for a significant period of that time our habits have fundamentally changed, at least for now.

In 2022, we expect to see a lot more direct to streaming products, films that would once have been released to the cinema coming direct to your screens at home via an exclusive streaming service.

There will of course be a tipping point, consumers won't sign up for every service to get every show so where will that point be?



SEEMA TALWAR

SENIOR CONSULTANT, AURUM GLOBAL

Through the pandemic – we have seen viewing behaviours shift to more digital as theatres closed and there was a lack of new content in any channel coupled with more time at home. The emergence of studio specific streaming services (eg. Disney+; HBO Max; Peacock) coupled with those more general services that already exist – the likes of Netflix; Prime who are also now more focused on content production to drive points of difference – I believe will have the biggest impact this year. How many subscription services will a consumer sign up for? Will there only be a single place to get a specific show / film depending on who owns the right; will the offerings be fragmented across multiple platforms? What impact to traditional upstream channels (eg. will more new films go straight to streaming vs. theatrical)?

ENDER-USER CONSUMPTION



PETER OSTAPIUK

SENIOR VICE PRESIDENT OF SALES NORTH AMERICA, ENCOMPASS DIGITAL MEDIA, INC.

The impact of COVID-19 accelerated plans and expansion and launches of direct to consumer platforms.

Media companies will work to optimize operations to allow consolidated operational platforms addressing different business models and distribution models.

Outsourcing of services for smaller revenue stream ops will be a popular choice.

Media workflows will start moving in its entirety to cloud and IP environment.

Smaller media companies that do not have scale will need to partner or integrate with similar genre companies with different type of media (i.e print) or distribution means (OTT)

“Media workflows will start moving in its entirety to cloud and IP environment.”

AGILE WORKING – REMOTE PRODUCTION

The pandemic has meant that a whole host of broadcasts had to adjust their operations to make sure they could continue to function, meaning editors needed to edit from home, producers needed to be on Zoom calls to make sure meetings went smoothly and broadcasts happen as they should.

All this has meant that companies have seen that it CAN be done, and employees CAN function from home, and sometimes perhaps even more effectively than they had been beforehand.

We think this trend will continue into 2022, with the best broadcasters finding ways for their teams to be as productive as possible. Gone are the days when sending GBs of data is impossible and takes days to download. With careful planning and a great company culture then these companies will thrive in 2022.



JOHN BOZZA

CHIEF EXECUTIVE OFFICER, RACETECH

We're likely to see the continuation of the shift towards remote working and automated production. This has been accelerated by the pandemic and social/environmental responsibility to work safer and smarter.

Sourcing staff, rising fuel costs and the risks to our operation due to Covid-19 are driving us to challenge all aspects of our live sport production.

And there we have it, our view on the key trends in the Content & Media industry for 2022.

We'd love to get your thoughts on these trends, and if there are any others we've missed, get in touch with us using the details below.

All the best,

neuco's Content & Media team

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