



EXPERIENCE MAKERS^{LIVE}





New Realities in Marketing for Media and Entertainment

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The media and entertainment landscape

Streaming video increases **61%** when consumers stay at home during disruptive events (Nielsen)

Number of Australians using the internet surged **56%**

Vodafone's internet usage has surged by up to **50%**

AT&T - wireless voice calls up **44%** Wi-Fi up **88%**, landline home phone calls were up **74%**

The seven largest SVOD services saw an average **75%** increase in daily signups, with Disney+ up more than **225%** in the first week of the shutdown, and 110% jump in the second

Live entertainment and sports leagues were suspended and seasons delayed or cancelled in some cases

Movie theaters around the country have closed. Studios have invested heavily in spring releases and forced to defer releases and revenues

Advertiser Perceptions surveyed the buy side in late March spending plans. Almost **+90%** of advertisers said they had taken some type of reductive spend action



GTM Matters:

Impact to Subscription Businesses

- **53.3%** of companies have not seen a significant impact to their subscriber acquisition rates
- **22.5%** of companies are seeing their subscription growth rate accelerate
- **< 25%** are seeing a slowdown
- Companies that offer their customers the option to suspend and resume their subscription services have a **5%** lower annual churn rate as compared to peers



Accelerating

OTT Video Streaming, Digital News & Media, E-Learning, Communications Software.



Limited Impact

B2B & B2C Software, Information Services.



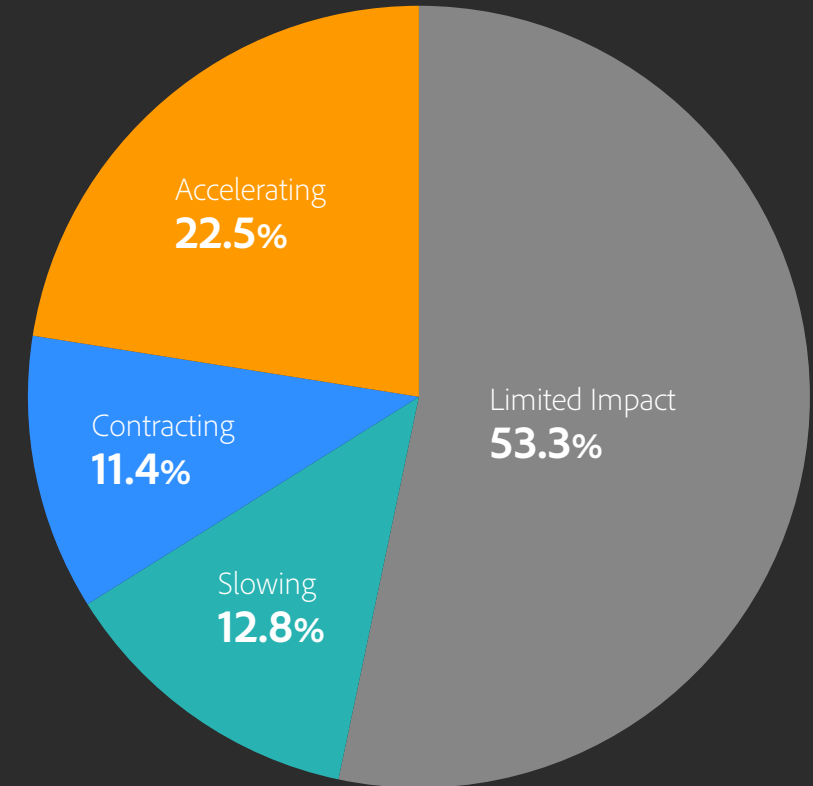
Slowing

Consumer IoT, Business IoT Services, Software for Small Business, Memberships.



Contracting

Travel & Hospitality, Sports Related Services.



Source: Zuora

Broader landscape

Journalism
under pressure

The power of big
tech

Advertising
ecosystem
pressure

Streaming
battle lines

Regulation
red flags

Misinformation
and
disinformation

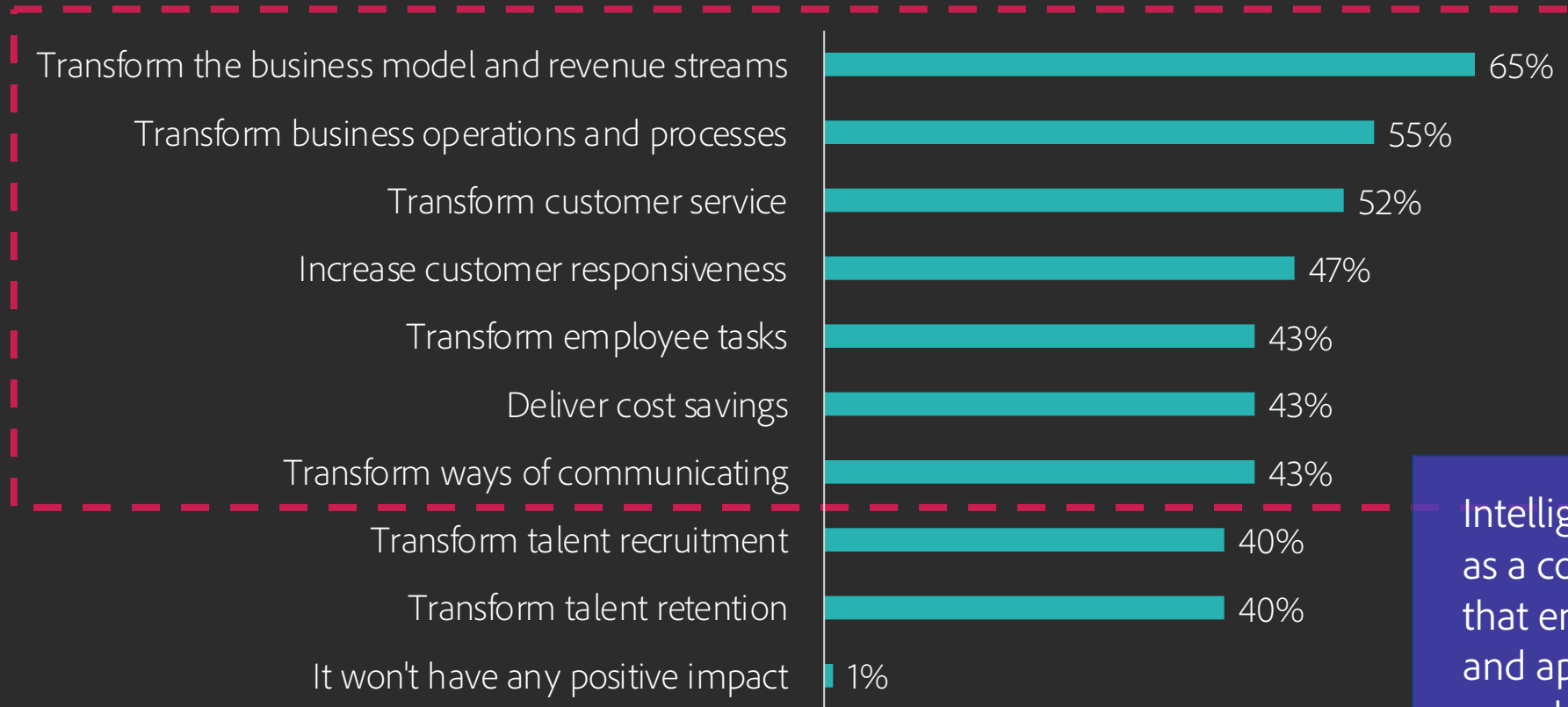
Limited and
underutilised
data

Audience
fragmentation



Emergency situations require intelligent data management

What Capabilities Do Business and IT Decision-Makers Worldwide Believe Intelligent Data Management Can Have Within Their Company?



Intelligent data management is defined as a company's management of data that enables teams to respond instantly and appropriately to what matters anywhere across the enterprise's infrastructure.

Note: n=1,575

Source: Veeam, "2019 Veeam Cloud Data Management Report" conducted by Vanson Bourne, June 4, 2019. % of respondents, Sprint 2019

Pivoting to new demands while planning for the future



Regulation

Is the future



Direct

to consumer powered
by digital



Inequity

of information access
and brand safety



Value

creation beyond
content alone



Registration

and user
authentication to build
first party data



Data Reckoning

and innovation
acceleration



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Chief Sales Officer
Nine



Thank you!

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