

# Driving Digital Content

reaching for  
the mass market

4-5 June 2009  
London, UK

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The logo for Futuresource Consulting features a stylized sun or starburst icon with a central blue sphere and eight rays extending outwards, positioned between the words 'futuresource' and 'CONSULTING'.



Visit Macrovision  
at *Driving Digital Content*,  
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you revolutionise the home  
entertainment experience.

Macrovision continues to evolve with the consumer electronics and entertainment industries. Our solutions help consumers discover, manage and enjoy digital media.

- Watch movies and TV shows anytime, anywhere
- Play music anytime, anywhere
- View family photos anytime, anywhere
- Get rich information about TV, movies, music and games anytime, anywhere

For more information, please visit [www.macrovision.com](http://www.macrovision.com)  
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**macrovision®**

Enabling a uniquely simple home  
entertainment experience.

## Welcome

Consumers are increasingly demanding entertainment and information on their terms. With interest in the digital delivery of entertainment content at an all time high, many questions still remain unanswered and some fundamental business issues are as yet unresolved.

### Meet the Futuresource Directors



Tony Bicknell



Jim Bottoms



Sarah Carroll



Andrew Snoad

Now in its third year, 'Driving Digital Content' has brought together key industry figures for this two-day conference focusing on the business opportunities presented by the continued rise of digital content delivery and the impact upon the wider industry. Over the course of the conference we will take a look at the developing digital content landscape, its performance over the last 12 months and the levels and types of business activity we can expect to see over the next five years.

This conference is guaranteed to provide you with the knowledge you need at this time of industry change. Take in the presentations, visit the demo booths, discuss potential business ventures, network and share information, and chat with our experienced analysts and consultants who will be on hand to answer your questions.



## Conference agenda

### Day 1: Thursday 4 June

#### 09:00 Welcome and Opening Remarks

#### 09:10 Futuresource Market Focus Session Examining the Digital Video Landscape

Reviewing the prospects for the digital distribution of content across online and mobile platforms. How has the business outlook developed over the past 12 months and how big a part does digital now play in the overall entertainment content business? Are the emergence of new platforms and the growing ownership of new devices growing the overall market or is it just becoming increasingly fragmented? This opening paper provides essential market data and sets the scene for this year's event.

**Jim Bottoms**, Director, Futuresource Consulting

#### 09:30 Futuresource Market Focus Session Living With Digital: Consumer Insights into Entertainment Consumption

Hear the results of Futuresource Consulting's up-to-the-minute consumer research findings on digital entertainment consumption. Drawing on direct feedback from users in the UK, France, Germany and the USA, this in-depth study is based on original new research conducted in May with a representative sample, including feedback from consumers as young as 12 years old.

**Alison Casey**, Head of Global Content, Futuresource Consulting

#### 09:55 Building Online Community-Driven Entertainment

Media companies have faced arguably their biggest challenge with the emergence of online content and the empowerment of the consumer to get content on any device, anywhere and anytime. Fragmentation of the audience, traditional revenue model disruption and the increasing cost and complexity of technology have left many broadcasters wondering how they will succeed in this digital world. This presentation looks at community driven entertainment that empowers

broadcasters to take control of their content and brands.

**Neville Wheeler**, Director, Cisco Media Solutions, Cisco Systems

#### 10:10 Coffee Break

#### 10:40 The Role of Broadcasters in the Digital World

The new delivery platforms of online and mobile present both opportunities and threats to traditional broadcasters. How is the industry responding to these challenges and what are they doing to retain consumers and develop new revenue streams in the digital age?

**Moderator: Richard Lindsay-Davies**, Director General, DTG

**Alix Pryde**, Controller, BBC Distribution

**Kevin Baughan**, Director of Technical Strategy & Product Development, Virgin Media

**Dori Ben-Moshe**, Chief Architect & Strategy - Multimedia Solutions, Alcatel-Lucent

**Simon Fell**, Director of Future Technologies, ITV

**Simon McGrath**, CMO & Commercial Director EMEA, SeaChange International

#### 11:50 What is Television?

With advances in technology, expanded deployment of broadband, and a demand from users to access the content they want whenever they want, the TV is no longer merely a device to get broadcast, cable or satellite programming. TVs from several major manufacturers are now enabled to deliver the best content from the Internet. How will this change the way we watch TV? What will this mean to the future of the industry? And what possibilities are just around the corner?

**Patrick Barry**, VP, Connected TV, Yahoo!

**12:10 Online Delivery to the TV:  
Breaking New Ground**

The broadcast industry has increasingly been making its content available online with fantastic results, in many cases creating additive viewing. However, numerous consumer surveys highlight that most consumers would prefer to watch this content on the main TV in the home. At the same time, many TV and CE vendors are looking at ways in which to differentiate their products from the competition and add value to their consumer proposition by incorporating IP connectivity and securing content deals. In this series of presentations and Q&A panel session, a number of leading players share their views on the future for connected CE devices and online content delivery services.

**Moderator: Sarah Carroll**, Director, Futuresource Consulting

**Edd Uzzell**, Technical Product Development Manager, Sony

**Andrew Parker**, Director of Technology & Strategy, EMEA, ExtendMedia

**Patrick Barry**, VP, Connected TV, Yahoo!

**12:50 Lunch brought to you by Sony DADC**

**14:00 Futuresource Market Focus Session  
Features, Apps & Familiar Brands: Driving the  
Connected Mobile Consumer**

Mobile apps, content and connectivity have been revitalised in recent months, with various apps stores receiving increased publicity. This presentation and subsequent panel look at the key drivers in the mobile marketplace, focusing on how the industry is helping evolve consumer behaviour.

**David Sidebottom**, Digital Media Consultant, Futuresource Consulting

**14:15 The Mobile Phone Story:  
Direct-To-Consumer Solutions**

The technology is in place to deliver the customer experience and it's now down to the industry to work in partnership to make the business models work. This session explores the consumer interface and the associated programmes of activities, examining the success stories.

**Dirk Hofmann**, Director, Consumer Data & Interaction, Nokia

**14:35 The Mobile Phone Story: Reigniting the  
Growth in Digital Music Revenues**

Online music revenue growth is showing signs of slowing in many leading markets. Can the mobile phone industry breathe new life into digital music revenues?

**Reinhard Blaukovitsch**, VP DigitalWorks, Sony DADC

**14:55 The Mobile Phone Story:  
Content Management & Delivery**

This session addresses the delivery of relevant and effective mobile services to consumers, and will include demonstrations of mobile video, TV and movie services.

**Shashi Fernando**, CEO, Saffron Digital

**15:15 The Mobile Phone Story:  
Mobile Data Explosion Exposed**

There has been an explosion in mobile data over the past few months according to research revealed by Orange UK as people increasingly capitalise on the convenience, ease and flexibility of being able to connect to the internet wherever and whenever they want. This presentation will look at the main drivers behind this data explosion and whether it is set to continue.

**Jake Redford**, Head of Mobile TV & Video Partnerships, Orange



# Conference agenda

## Day 1: Thursday 4 June

### 15:30 Coffee Break

### 16:00 The Mobile Phone Story: Panel Session

Leading industry players share their views on what can be achieved in entertainment for the mobile phone and review the success factors and business models that will make this happen.

**Moderator: David Sidebottom**, Digital Media Consultant, Futuresource Consulting

**Jake Redford**, Head of Mobile TV & Video Partnerships, Orange

**Dirk Hofmann**, Director, Consumer Data & Interaction, Nokia

**Reinhard Blaukovitsch**, VP Digital Works, Sony DADC

**Shashi Fernando**, CEO, Saffron Digital

### 16:30 From Disc to Digital: Transitioning the Consumer

Increasingly, video content owners are including BD-Live features on their Blu-ray discs and adding digital copy to both Blu-ray and DVD. The objective for some studios is to add value to physical media and encourage consumers to purchase higher cost SKUs; for others it's all about transitioning the consumer to digital content and combating illegal downloads.

**Nicola Pearcey**, Managing Director, Lions Gate Home Entertainment

**Caroline Dean**, Executive Director, Marketing & Communications, Sony Pictures Home Entertainment

### 17:15 End of Day 1

## Day 2: Friday 5 June

### 09:00 Futuresource Market Focus Session The 3D Landscape

With 3D a hot topic across the entire industry value chain, this presentation introduces the background to mass market 3D deployment and highlights some of the issues and challenges likely to be faced.

**Mike Fisher**, Senior Consultant, Futuresource Consulting

### 09:10 3D Session Keynote

**Eisuke Tsuyuzaki**, VP, Corporate Development & General Manager, Panasonic

### 09:25 3D: From Theatre to Home - How Soon the Reality?

The prospect of delivering 3D entertainment to the home is generating substantial interest from a range of industry sectors. Content producers, the broadcast industry, TV set makers, video games companies and disc replicators are all set to benefit. How soon can this become a commercial reality and which industry groups will drive consumer adoption?

**Moderator: Sarah Carroll**, Director, Futuresource Consulting

**Benn Carr**, VP of New Technology, Walt Disney Studios/BDA 3D Taskforce Chair

**Brian Lenz**, Head of Product Design & Innovation, Sky

**Andy Millns**, Director, Initium

**Nicholas Routhier**, President & CEO, Sensio

**Eisuke Tsuyuzaki**, VP, Corporate Development & General Manager, Panasonic

### 10:10 Electronic Books - A New Digital Content Delivery Opportunity

E-books are being hailed as the next digital revenue opportunity. This presentation looks at the story so far and the chapters yet to be written for the E-book industry. Is this a long term business and how will devices and services evolve to stimulate continued

revenue growth?

**Adrian Northover Smith**, Digital Development Manager, Sony

### 10:25 Coffee Break

### 10:55 Futuresource Market Focus Session Roadmap to the Connected Home

The ability to connect digital devices together around the home has been much anticipated over recent years and is now becoming a reality. This presentation outlines developments in this area and explores the future opportunities.

**Carl Hibbert**, Business Consultant, Futuresource Consulting

### 11:05 The Connected Home

IP networks are now in around 60% of Broadband homes and evolving into powerful distribution platforms able to reach out to a wide range of handheld and static products. The Pay-TV industry is also looking for ways to use digital networks to distribute premium content around the home. This session looks at how developments in home networking are likely to influence digital content delivery, storage and access.

**Moderator: John Bird**, Principal Consultant, Futuresource Consulting

**Richard Bullwinkle**, Chief Evangelist, Macrovision Corporation

**Johan Craeybeckx**, CTO, Testronic Labs

**Neil Thompson**, Senior Regional Director, Entertainment & Devices Division, Microsoft

**Steve Farmer**, IPTV Strategy & Business Development, Motorola

**Simon Forrest**, Chief Technologist, Pace

**Tom Cordiner**, VP Sales EMEA, Technicolor Digital Content Delivery

### 12:05 The Changing Role of the Retailer in Digital Content Distribution

Retailers have always played a key role in generating revenues for the music, video and games industries. Although digital distribution allows content owners to deliver direct to consumers, the role and brand awareness of the online retailers should never be underestimated. This panel of European retailers, who offer online content to their customers, will discuss their experiences to date and explore the synergies between traditional and online retail.

**Moderator: Alison Casey**, Head of Global Content, Futuresource Consulting

**Kim Bayley**, Director General, ERA

**Richard Smith**, Head of Digital, Tesco

**Simon Morris**, Marketing Director, LOVEFiLM

### 12:35 Ad Funded Content for Online and Mobile

Historically, half of all revenues generated by the television industry come from advertising. In the digital world, advertising has an even more important role to play as a generator of revenues. Over the last 12 months the success of Hulu in the USA and the increasing presence of broadcasters moving their programming onto their websites has kick-started this important sector. This panel discusses the opportunities and pitfalls of offering premium TV, movie, music and games content free to consumers on an ad funded basis.

**Moderator: Alison Casey**, Head of Global Content, Futuresource Consulting

**Laurence Aderemi**, Business Development Director (EMEA), admob

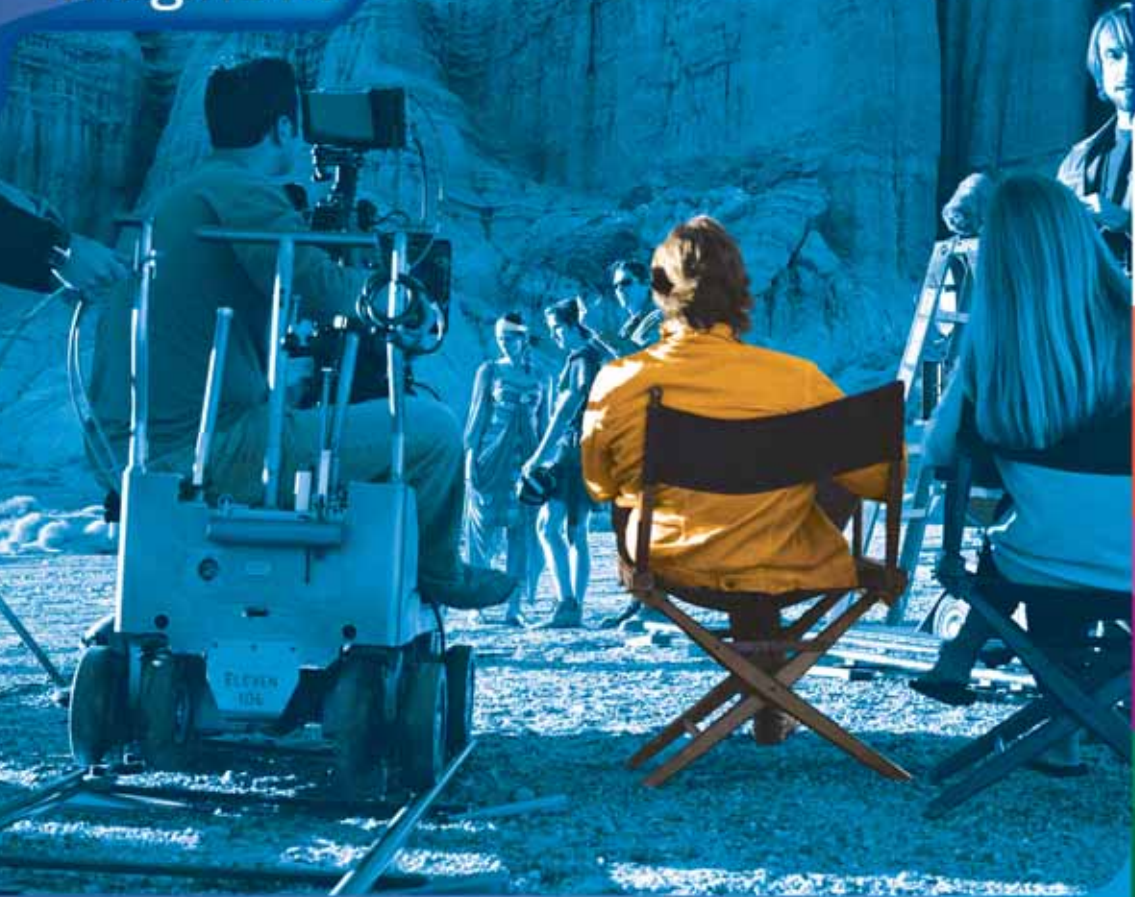
**Steve Purdham**, CEO, We7

**Mike James**, Managing Director, Adconion Media Group

**Sam Kayum**, UK Managing Director, smartclip Platform A, Speaker TBC

### 13:15 Wrap Up and Conference Close

Imagine it.



Now have it in HD. Blu-ray Disc is adopted world-wide as the HD successor of DVD. Blu-ray's superior technical performance gives you unsurpassed true High-Definition picture and sound quality. Whether you watch movies on Blu-ray, listen to concerts on Blu-ray, play games on Blu-ray or relive your home movies on Blu-ray, you are assured you get the maximum HD experience possible. **Have it, to believe it!**



See it. Hear it. Play it. Create it.

# What is Blu-ray Disc?

Blu-ray Disc lets you see your favourite movies in true High-Definition picture quality. Blu-ray is the only digital medium that can achieve the highest possible profile in 1080p HD Video. Connect Blu-ray to your HDTV and you will experience six times better video quality than with DVD. You can also use Blu-ray Disc players for DVD's and CD's. **See it, to believe it!**



See it.

Blu-ray Disc lets you hear movie sound-effects and concert videos in High-Definition surround sound. Only Blu-ray can reproduce multi-channel music with no loss from the original master recording. Connect Blu-ray to your audio system and you will hear details you've never heard before. You can also play your music DVD's and CD's on Blu-ray Disc players. **Hear it, to believe it!**



Hear it.

Blu-ray Disc lets you play games with mind-blowing realism. Only Blu-ray has the capacity and data speed to deliver the massive amounts of information needed for High-Definition gaming. **Play it, to believe it!**



Play it.

Create your HD home movies on a Blu-ray computer drive and re-live your memories in true HD on your HDTV. Only Blu-ray Disc has the capacity to safely store your precious HD Camcorder recordings in the original HD video quality. **Create it, to believe it!**



Create it.



TRUE HD  
EXPERIENCE



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# Ready to take your online video offering to **multiple screens**?



Evolving video industry dynamics mean that single-screen PC-based video offerings are no longer enough to meet your business goals or your customer's expectations. To address the necessity of anytime, anywhere, any device video consumption, media companies and network operators must offer services that span PC, TV and mobile devices. In order to maximize revenue potential, these offerings must also support multiple business models, including ad-supported, subscription, video-on-demand and pay-per-view.

Find out how a flexible video infrastructure can help you support a best-in-class offering for the management, publishing and delivery of digital video services across multiple screens. Visit us at [www.extend.com](http://www.extend.com) and request our latest white paper.

**One screen is not enough.** Learn how to create, launch and manage a multi-screen video service with ExtendMedia.



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POWERING DIGITAL MEDIA BUSINESSES

# Monetizing Multi-Screen Video with ExtendMedia

ExtendMedia is the leading independent provider of software and solutions for network operators, media companies and other content distributors looking to create, launch, manage and monetize commercial video services. Our flagship product, OpenCASE, is a carrier-grade platform purpose built for flexibility, robustness and scalability. Using OpenCASE, our customers reduce costs by unifying their video content management platforms, maximize revenues by supporting both ad-supported and commerce-based business models, and provide a best-in-class user experience by delivering streaming or downloaded content to any "screen" including PCs, TVs and mobile devices.

ExtendMedia also recognizes that running a successful digital media business often involves integrating with numerous legacy and best-of-breed technology platforms and partners. To that end, OpenCASE offers the extensibility and interoperability needed to include out-of-the-box integratio with leading ad servers, CDNs, DRM providers and encoding platforms. In addition, the platform provides a comprehensive set of Web service-based APIs for easy integration with existing infrastructure. Finally, ExtendMedia offers a full range of expert consulting and professional services to help our customers and partners make the most of their investment in our platform.



## OpenCASE Overview

OpenCASE is a modular, end-to-end platform for the management, publishing, monetization and delivery of digital video services to PCs, television and mobile devices. The platform provides a comprehensive suite of capabilities to help you run a profitable digital media business, including:

- Unified Ingestion and Content Management
- Content Syndication and Publishing
- Ad Network Integration
- Product Configuration, Bundling and Pricing
- Billing and Transaction Management
- Content Fulfillment, Distribution and Delivery
- DRM and Rights Management
- Subscriber and Profile Management
- Multi-screen Device Management and Synchronization
- Reporting and Analytics



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## Sony DADC - Digital Media Manager

Online distribution of content is a growing and fast moving market. As your one-stop-shop solution provider, Sony DADC can help your business in the transition from physical to digital distribution and offer solutions for all your supply chain service requirements.

Sony DADC offers customers a range of Digital Content Services as fully managed, on-demand services. These services allow customers to manage the costs associated with administering, digitizing, archiving, and distributing rich media digital content to take advantage of new digital distribution channels and revenues.

Our **Digital Media Manager** provides an out of the box solution for all kinds of market demands in the digital entertainment industry. DMM is a digital asset management and distribution solution that makes your content available everywhere at anytime.

Our services allow customers to manage the costs associated with administering, digitizing, archiving and distributing rich media digital content to take advantage of new digital distribution channels and revenues. As part of this service to help customers focus on their core business objectives, whilst dramatically reducing their infrastructure and technology costs.



**Our end-to-end Digital Content Services provide solutions and services that cover:**

- Digitization and preparation of content
- Centralized, secure, and distributed access to a digital content repository
- Encoding and DRM packaging
- Metadata administration
- Secure hosting services
- Digital distribution services to B2B partners such as Digital Service Providers (DSPs)
- Customer services and helpdesk facilities



## Moving into the fast lane of digital distribution

[drm.sonydadc.com](http://drm.sonydadc.com)

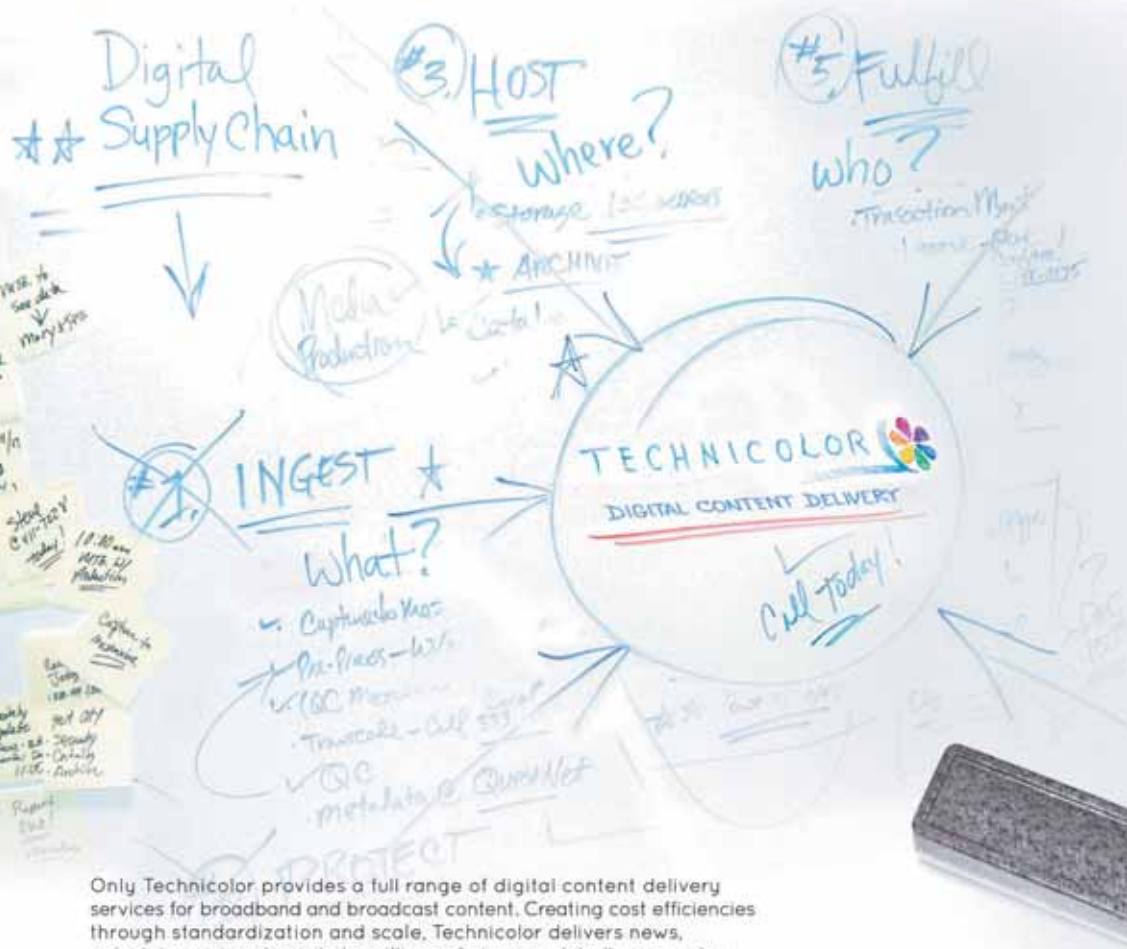


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# Digital Content Delivery

## We make it simple.



Only Technicolor provides a full range of digital content delivery services for broadband and broadcast content. Creating cost efficiencies through standardization and scale, Technicolor delivers news, entertainment and sports to millions of viewers globally every day. From content ingest and management to broadcast playout and online delivery, including innovative Blu-ray disc-initiated services, Technicolor gets your content to your viewers how they want it, when they want it. It is that simple.

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