

# Digital Video Delivery Market Snapshot for Media and Entertainment

## Delivery Workflow

Service Providers	Ingest and Preparation					Rights Management*			Commerce				Delivery					Reporting and Analytics									
	Category Coverage	Encoding / Transcoding	Content Management	Commerce - centric metadata	Storage	Category Coverage	Watermarking	GeIP	Syndication Policies	Category Coverage	Flexible Business Models	Promotion / Recommendation	Settlement	Syndication	Ad support	Category Coverage	Live Streaming	Mobile phone	Personal Computer	Set-top box	P2P	Customizable player	Category Coverage	Revenue share	Consumer experience	Content performance	Ads watched
Anystream	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Artesia	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Ascent Media	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Digital Rapids <sup>1</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Move Networks	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Technicolor – EDS	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
thePlatform	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Entriq	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Extend Media	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Maven Networks	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
PermissionTV	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
KIT digital	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Akamai	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Brightcove	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
GridNetworks	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Highwinds	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Internap	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Kontiki	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Level 3	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Limelight Networks	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Pando Networks	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

The list of companies shown is representative of the market and may not be comprehensive. The digital video content delivery market is growing, with new companies entering and corporate structure for existing companies being modified at a fast pace.

<sup>1</sup>Digital Rapids provides hardware based encoding and delivery of live event streams. Their typical sales model is to service providers.

In general, the companies listed in the workflow chart operate as services, rather than licensing their applications. Some companies will license technology depending on the needs of their customers.

For a full solution, integration across service providers is generally required. System integration may be offered by service providers or through third party system integrators.

\*See Rights Management on delivery workflow chart.



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## Industry Trends

Video publishers adapt to the challenges and opportunities presented by:

- Consumer use of broadband Internet for video viewing
- Emerging video capabilities in mobile networks and handsets
- Near-constant entrance of new providers and viewing platforms
- Consumer interactions and creation of video through social networking
- Focused targeting of consumers enabled by digital video platforms
- Publishers and advertisers reach the right people with content and information
- Multiple smaller markets add up to significant revenues.

Content evolves to leverage digital delivery:

- Content created specifically for digital video delivery.
- Re-purposed content to satisfy the broad range of delivery platforms.
- More metadata and more consistent metadata to ease management, deployment, consumer access, and revenue distribution through the value chain.

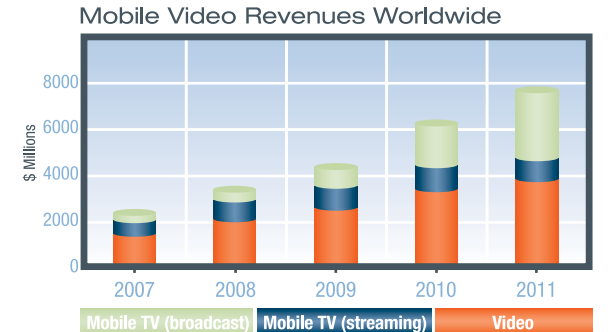
Companies with an effective digital video delivery workflow can:

- Be more agile in the face of change
- Keep a close watch on consumer behaviors as they change and evolve
- Quickly deploy, analyze and refine content and commerce models across multiple platforms

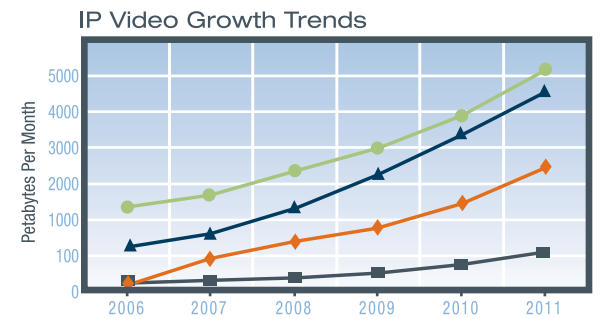
\*Digital Rights Management (DRM) ubiquitous with multiple vendors offering solutions for integration:

- Microsoft Silverlight
- Adobe Flash
- Widevine Technologies
- BuyDRM

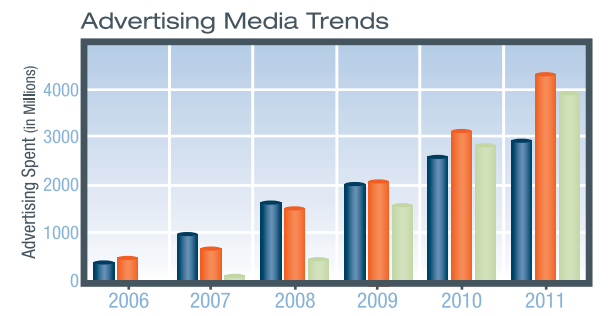
## Consumer Trends



Informa Telecoms & Media – Fast Facts for Journalists  
eMarketer 2008  
Marketing Mechanics 2008



Cisco Visual Networking Index – Forecast and Methodology, 2007–2011 June 2008  
Marketing Mechanics, 2008



YoY Growth	2007	2008	2009	2010	2011
Social Networking	163%	70%	29%	19%	13%
Online Video	89%	74%	56%	48%	39%
Mobile Video	0%	216%	253%	80%	40%

iSuppli Corporation as cited by Digitimes, November 2007  
eMarketer 2007  
Marketing Mechanics 2008