Reimagining the content supply chain – four key learnings from NAB25

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1. The new content supply chain paradigm – doing “less with less”

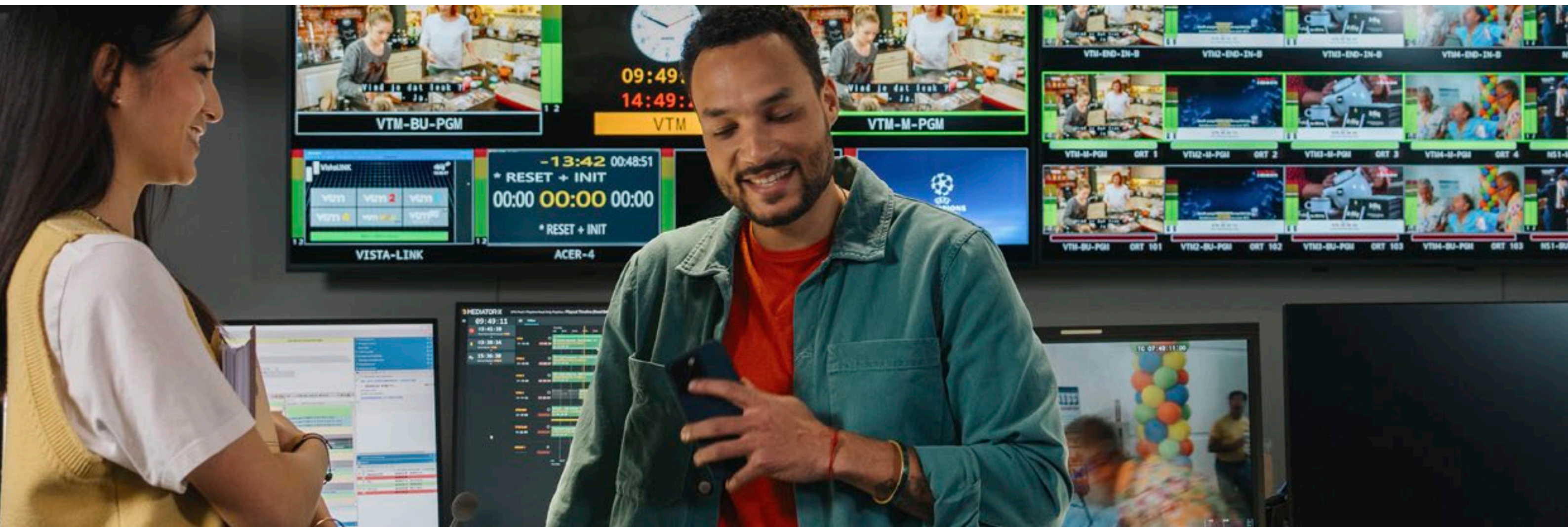
There’s always an urge to declare a single theme from any of the Media & Entertainment industry’s major trade shows – and NAB25 is no exception.

The need to simplify the multiple trends that broadcasters and media companies are facing today is understandable, but in truth the world – and our industry – is way more complicated than a simple summary. Even if – according to some analysts – Artificial Intelligence was that simple summation of the key theme at NAB this year.

In reality, many threads/themes/topics were discussed among the multiple conference sessions and by the 55,000 attendees this year.

For me though, the constant “hum” underlying many of the discussions was about a critical challenge that all broadcasters and media companies face at the moment – the need to radically change their content supply chain (or value chain).

This need has been discussed within the industry for a while now, but at a relatively hidden level – but it came much more into the open at NAB25.



What is “less with less”?

If you need to simplify this challenge, it’s best summed up by Phil Wiser, CTO of Paramount Global who was the first person I heard (well before NAB25) that used the phrase *“doing less with less”*.

By that he means that many broadcasters are having to look at not *how* they do each step along the content supply chain (from production to distribution), but rather *why* they are doing each step – and decide whether each and every step is needed.

That’s radically different from the concept of *“doing more with less”*, which many in the industry are still parroting, even at NAB25. **Doing more with less is about efficiency and productivity**, or about – at an overly simplified level – of churning more content through the supply chain for less cost per asset.

Doing less with less is a very different concept.

It’s not a unique concept of course. Back in the day when broadcasters (pioneered by Discovery) started moving part of their existing supply chain into the cloud, the most enlightened of them tried to avoid a simple “lift and shift” approach, and instead took a hard look at what they could simplify and/or do differently as they broke monolithic workflows into a series of microservices. Ideally, to transform the content supply chain.

But – as no-one says publicly – much of this transformational change was, well, not transformational, and there has been relatively little radical change of the existing supply chain steps.

2.

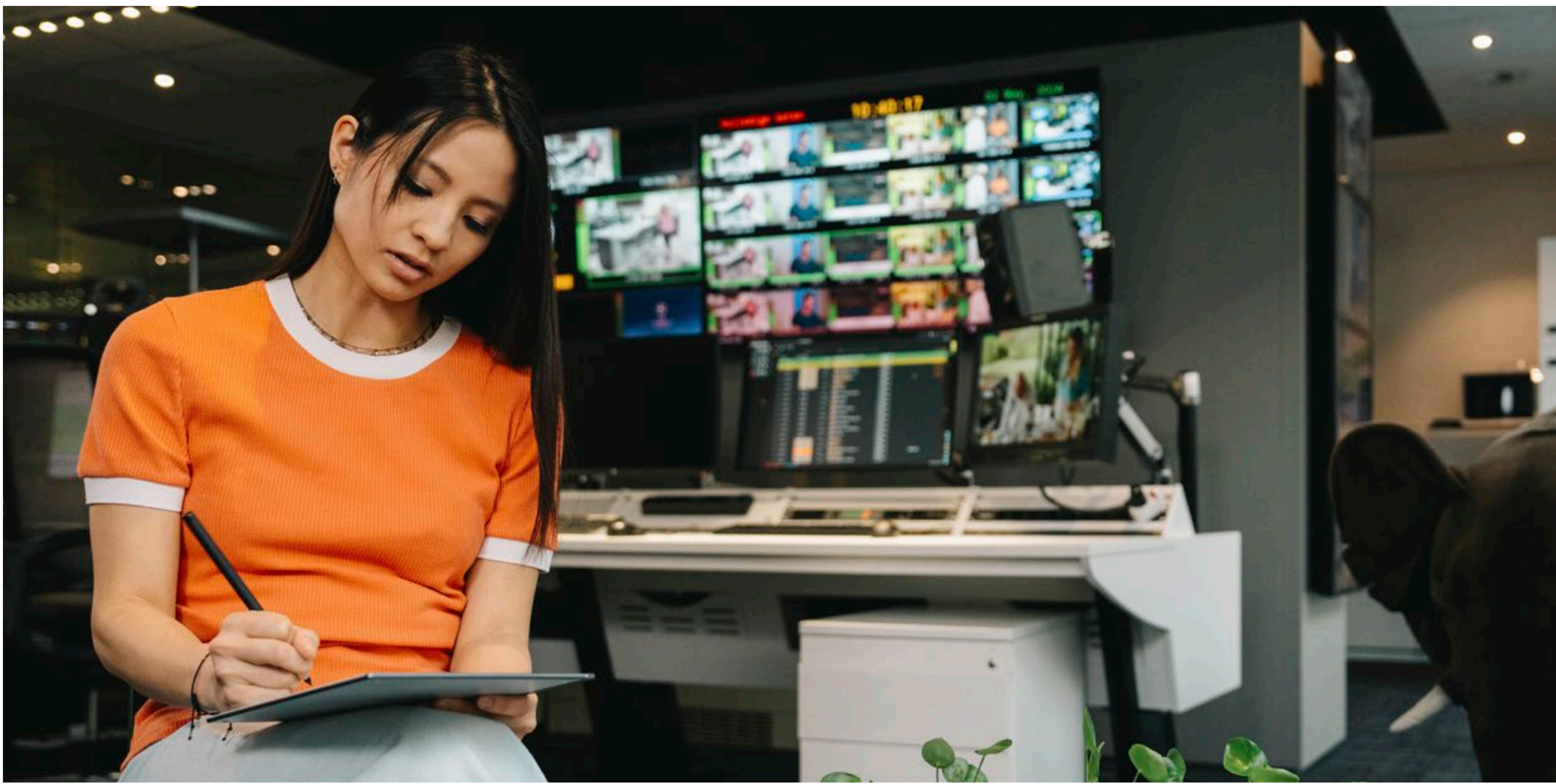
The imperative for change in the supply chain

In a way that didn't matter, as the prime reason to move into the cloud was to gain flexibility/agility, to make services easier to spin up and down, and to move from a capex to an opex model.

The situation today, however, is different.

Today, as one CXO put it at NAB25, there is an existential threat to the business models of many M&E companies. The Covid slowdown has been followed by the Ukraine war and now global recession risk sparked by evolving tariff policies and multiple other geopolitical externalities that are too long to list.

Those externalities are forcing M&E companies to take a long, hard look at what they do – and in a much more fundamental way than when the move to cloud came along.



If the previous three to five years have been about doing *"more with less"* – with efficiency being the principal goal in an attempt to take investment out of the media management and distribution parts of the value chain and put it into producing differentiating content – then today while that's still vital, it's no longer enough.

Instead, **the next five years will be about going much farther and much deeper into becoming more efficient** (the second less in *"less with less"*) – but critically with a laser-sharp focus on what not to do anymore – either by eliminating steps completely in the content supply chain or by doing some steps in a significantly different/simpler way.

At **NAB 25**, if you looked hard enough, there was growing evidence that this is the approach of many more M&E companies. Here are some quotes from major companies, as heard in various conference sessions:

> *"In this tricky market we need to be ruthless on what viewers really want from us and where they are happy to have more of a basic level of service."*
>
> *"How can we stop overbuilding applications?"*
>
> *"We need to take things out that we do now in the value chain."*
>
> *"We need to get rid of all the customized processes in the supply chain. They are hairballs."*

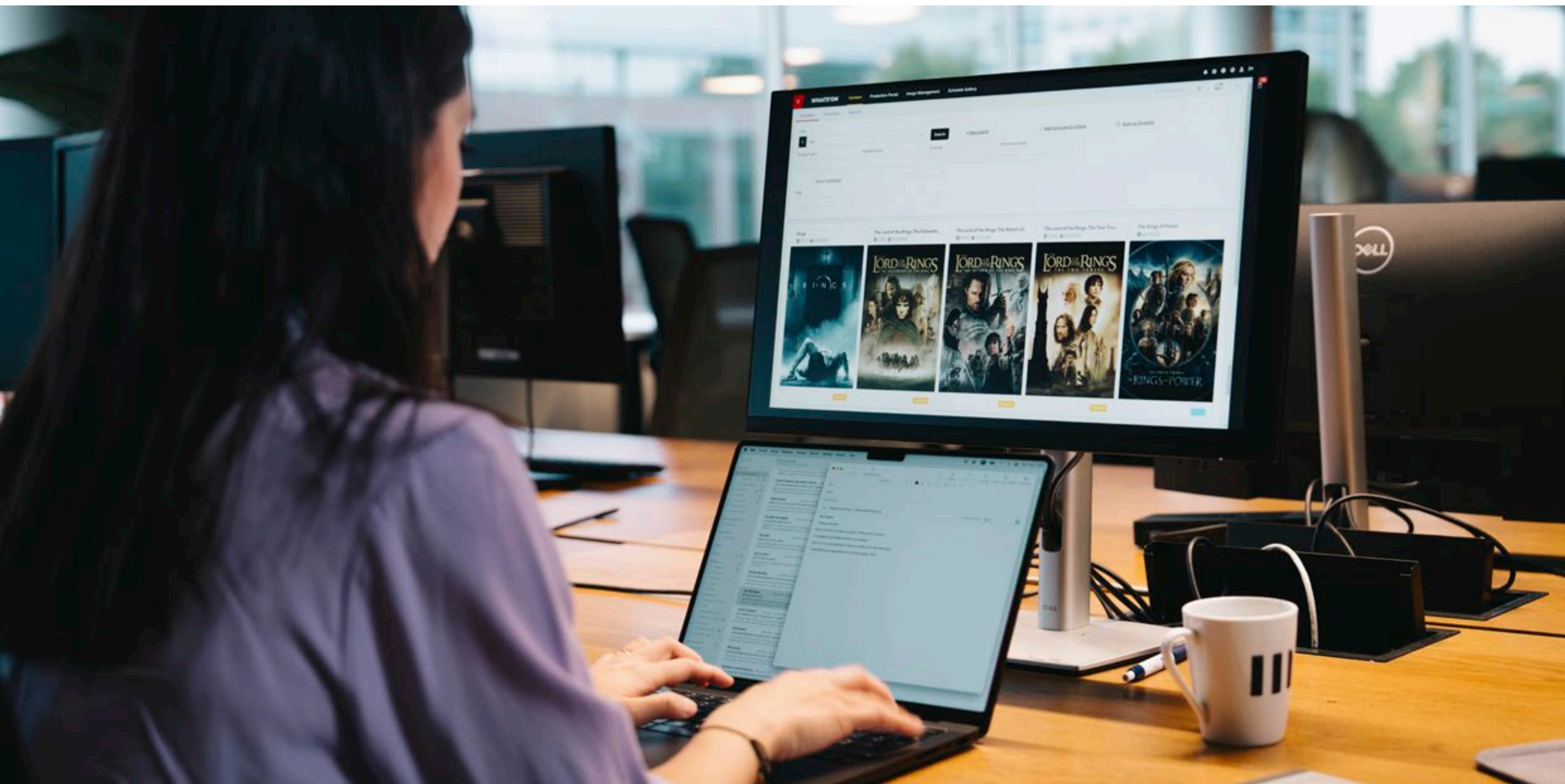
Practical examples

So, this is not – for example – about using AI for automated subtitling (which is quicker and cheaper, and now more accurate, than using people, other than perhaps for content using heavy dialects/accents or some languages), but instead about whether we need to provide subtitles at all.

Yes, that's heresy (and illegal!) in countries where regulation requires subtitles to be provided – but if it was not a legal requirement, should broadcasters keep providing this service? It's a real debate that I heard one broadcaster talking about at NAB.

Clearly if subtitling was not provided, then this would affect a significant proportion of viewers who need subtitles because of hearing issues, or who just like to have subtitles on anyway.

Cutting out this step clearly impacts the viewer experience, but it's a trade-off that some broadcasters may need to make in the future in order to provide a so-called more "basic level of service", as per the quote from a senior broadcast executive above.



Another (less impactful) example is the increasing tendency for broadcasters to abridge or completely cut the end credits of a broadcast programme.

Though creatives will be (and are!) horrified by this trend, why not just cut out the end credits from all programmes, as they add little to zero value for the viewer, and take up valuable broadcast time?

Some streaming platforms already offer AI-powered mechanisms allowing users to skip intros and credits … so why have them in the first place?

Another area that one broadcaster is looking at is QC, where the argument is that QC is not a binary yes/no choice; it may be possible to reduce or adjust QC checks in areas such as video file quality to exclude checking for errors that do not significantly impact quality. That does not mean we end up with everything looking like the infamous first CGI versions of the 2019 movie Cats, but rather that we stop trying to get absolute perfection in the video quality we need.

All of these examples come with obvious trade-offs, but as one executive said, *"do the downsides really matter? Do we really need 100% in everything we do?"* **Absolutely not, but….**

3. Achieving "less with less" through smart automation

...the key to "doing less" is to ensure that abridged or reduced steps cut out what is not needed without compromising on core steps that need to be more efficient. And by the same token it also implies to *not* remove what is indeed essential, especially if it can be accommodated more efficiently through automation.

The phrase Mediagenix uses in this respect is *"automation without compromise"*, which in our part of the content supply chain means, for example, that smart automation delivers a **scheduling process that is 80% quicker than standard scheduling** – but without losing the critical value-adding components of scheduling (like interstitials, promotions, bumpers, secondary events) that more basic, playlist-type automated scheduling solutions skip for no particular reason other than not supporting them.

Taking the example of scheduling further, this is about giving actual choice to media companies. They may want full-service scheduling for some of their channels, or pragmatic automated scheduling that delivers much faster scheduling while still preserving the key value-adding steps of full-service for other channels.

By the way, this smart, pragmatic automation goes **hand-in-hand with standardised workflows**, as opposed to endless customisations that are impossible and costly to maintain, and hamper content supply chain velocity going forward.

4. Content is expensive – so let's maximise its lifetime value...

Another practical example of smart automation is around the critical need for media companies to sweat their content assets more efficiently ([what we at Mediagenix call "Content Value Management"]). Fundamental to this is the maximization of both internal and external discoverability of content assets.

The big win here is to enable content curators within a media operation to elegantly discover similar content and curate their content bundles with powerful AI tools akin to what consumers are being offered by way of personalization and recommendation, to discover the right content in a much smarter way.

"Smart discovery" – as we call it – is about embedding smart content discovery within automated processes along the content supply chain; for example, within automated scheduling. In this way, advanced content recommendation can generate a 'Smart Content Pool' matching the channel's editorial direction and target audience.

This pool feeds our Scheduling Artist capability, which allows users to spectacularly accelerate FAST and linear channel creation.

In this way, our solution allows users to create engaging schedules in just a few clicks without having to compromise on any of the criteria that define a premium broadcast channel and automates multiple schedules from a single catalog to maximize rights exploitation across platforms during defined rights windows.

In fact, this transcends *"less with less"* and is actually rather *"more with less"*

In summary, doing *"less with less"* is already happening, and whether we like it or not, doing *"less with less"* is a term that the M&E industry will hear more of over the next few years.

Let's just be smart in how we approach this and centre the first *"less"* about doing the right things and the second *"less"* about efficiency.

And, frankly, when this is done well, there is obviously also still room for *"more with less"* – and it even creates headroom for a well-targeted *"more with more"*.

About Mediagenix

Mediagenix is a global leader in smart content solutions to profitably connect the right content to the right audience.

The **Mediagenix** modular SaaS platform orchestrates the entire content lifecycle to actively drive content lifetime value and audience engagement.

Content strategy, content value management, content scheduling and content personalization all converge into one lean, company-wide collaborative flow revolving around one source of truth.

Headquartered in Brussels, **Mediagenix** has offices in Bangkok, Denver, London, Madrid, Miami, New York City, Paris, Singapore, Skopje, and Sydney. With a team of 400+ experts working closely with 10,000+ users, **Mediagenix** is the trusted partner for more than 200 media companies globally.

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