

VIDEO INDUSTRY INSIGHTS

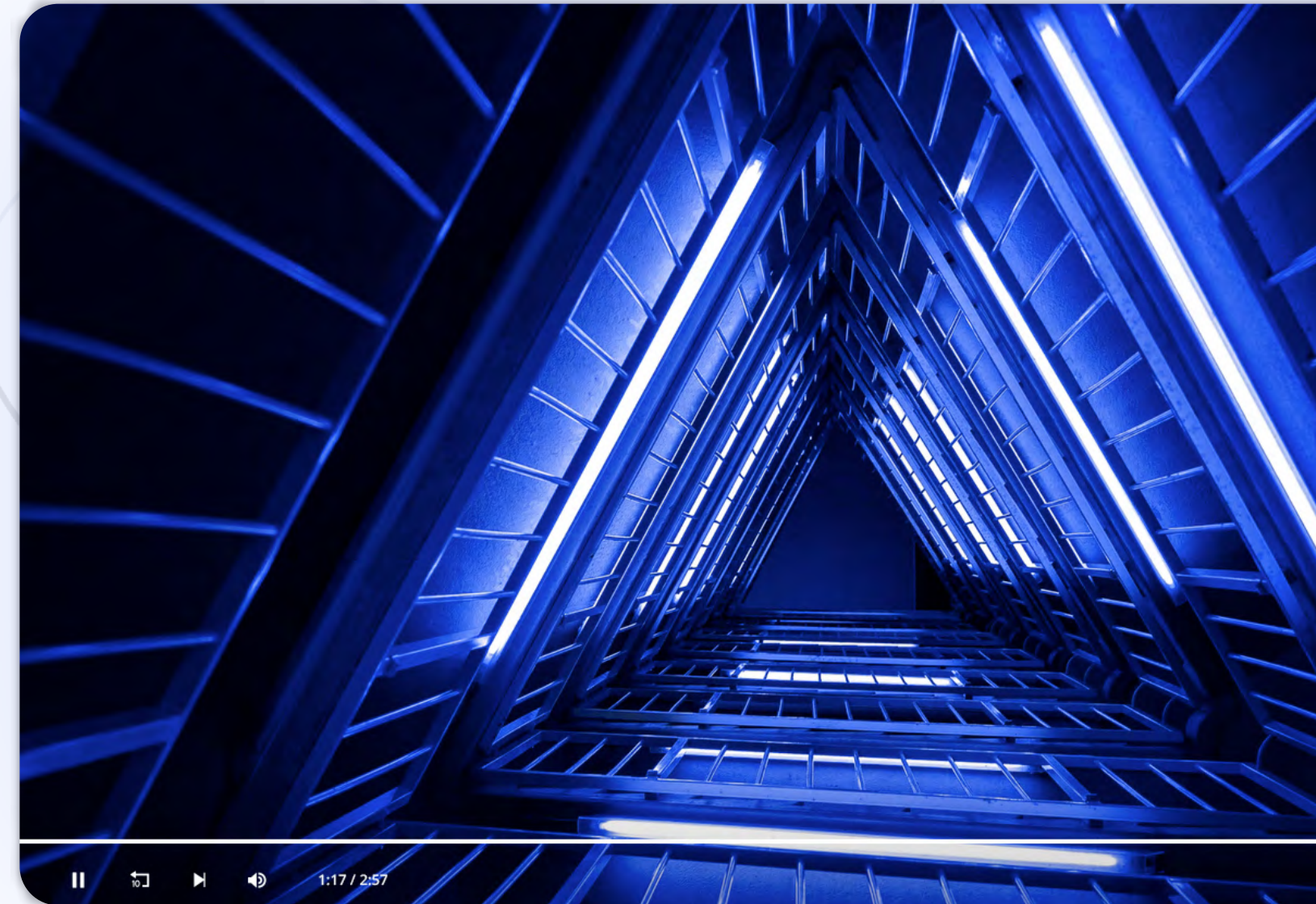
Video Industry Predictions for the Year Ahead

INTRODUCTION

2022: The Future of Video Streaming

The year 2021 was one of unprecedented growth and change in broadcast TV and digital video streaming. Amid global challenges and a rapidly changing industry, digital video consumption continued to grow on an accelerated trajectory. Consumers have more options than ever before for video content, by medium, channel, content type, and purpose. With the increase in demand, media companies have found creative ways to increase monetization and engagement through video.

As the video industry continues to evolve, JW Player is in a unique position with data from across 12,000+ unique media companies and 10 billion monthly impressions. Using this data and industry expertise, JW Player executives have compiled predictions on the future of video. Following two years of global change, it's clear that video is a part of our collective culture and the way media companies approach the medium will be increasingly important for their success.





The Rise of Interactive Video and Mixed Monetization Models

Video is going through a transformation right now from a mostly passive activity to an interactive activity. In 2022, we will see more retailers and ecommerce sites leveraging shoppable video to create an immersive shopping experience, while e-learning companies will use interactive video to keep students actively engaged with their lessons. Another trend worth watching is the growth of hybrid monetization models on the spectrum between AVOD and SVOD. As more consumers get subscription fatigue, freemium and TVOD models will be attractive options that can drive growth and revenue for content owners.

ABOUT DAVE

Dave has drawn on decades of executive-level IT experience to secure JW Player's position as the leading video software and data insights platform on the market. As its co-founder and chief executive officer, Dave has helped propel JW Player from a popular open-source video player to the digital video platform of choice for hundreds of thousands of businesses, including half of the comScore top 50 websites in the U.S. Dave's strategic leadership has helped JW Player's customer-base reach an average of over 1 billion viewers per month across 2.7 billion devices. Prior to his time at JW Player, Dave served in various leadership positions at companies including Nielsen/Net Rating and About.com. He earned a Bachelor's Degree in finance from Georgetown University and an MBA from Harvard Business School.



“Video is going through a transformation right now from a mostly passive activity to an interactive activity.”

Dave Otten, CEO and Co-Founder | JW Player

2 OTT Diversification



“I think some of these services will break into the top OTT charts, thereby expanding the scope of Connected TV beyond just watching movies and TV shows.”

Jeroen Wijering, Co-founder and Chief Innovation Officer

ABOUT JEROEN

JW Player's creator, co-founder, and chief product evangelist is a recognized expert in online video and standards who drives innovation and market awareness. He is active in the IAB and W3C standards committees and frequently presents at conferences such as IBC and Streaming Media. He graduated with honors from the Design Academy Eindhoven with a degree in management and communication.

I predict a diversification in OTT services. Last year we saw sports leagues, concert halls, yoga studios, conference centers, and other industries scramble to launch OTT services as lockdowns shut down their in-person business. We're now seeing consolidation happening, where successful services are acquiring more talent or content to expand further. I think some of these services will break into the top OTT charts, thereby expanding the scope of Connected TV beyond just watching movies and TV shows.



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Demand Will Grow for Off-the-Shelf OTT Platforms

As the options for delivering content continue to grow, so too will the demand for off-the-shelf, platform-based products for broadcasters. We see broadcasters wanting a robust, scalable platform that can deliver all their OTT offerings; for a lot of broadcasters it's hard to manage and deliver this in house so it's appealing to have a comprehensive off-the-shelf option. It massively speeds up with GTM initiatives and helps broadcasters become more responsive in introducing new products to their clients. In particular, broadcasters will look for platforms that can quickly create FAST channels for repurposing VOD content, with server-side ad insertion to create a seamless ad-supported user experience.



“We see broadcasters wanting a robust, scalable platform that can deliver all their OTT offerings; for a lot of broadcasters it's hard to manage and deliver this in house”

James Burt, SVP of Broadcast Products

ABOUT JAMES

James has over 20 years experience working in the streaming industry. Before joining JW Player in 2021 as SVP of Broadcast Products, James was previously the Chief Technology Officer at Twofour Digital and most recently the CTO & Co-Founder of Vualto. At Vualto he built a highly successful streaming business and architected and delivered broadcast projects for VRT, Telenor, ITV and other major broadcasters. Previous to Vualto, James was instrumental in delivering the original encoding solution behind the BBC iPlayer Radio and was part of the team that was first to deliver a full ABR/DRM solution to HBO Central Europe. He has a background in networks/IP and has worked with broadcasters and governments to solve workflows, systems integrations, and improve efficiencies with full-stack OTT services covering Live, VOD, DRM and Catchup services.

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OTT video strategies

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4

Direct to Consumer Video and Free TVs



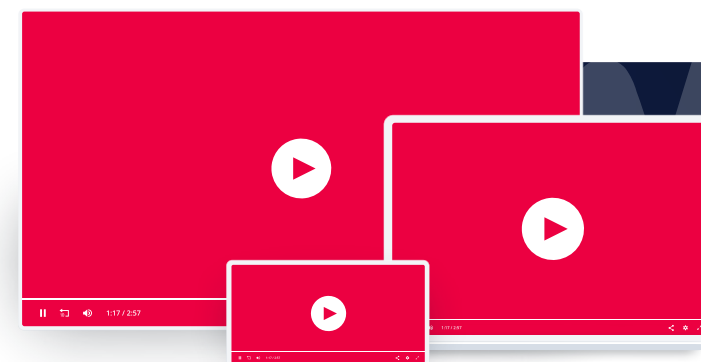
“Connected TV is one of the most valuable and fastest growing distribution platforms”

Brian Rifkin, Co-Founder, SVP of Strategic Partnerships

ABOUT BRIAN

At JW Player, Brian is focused on driving growth through strategic partnerships and leads the JW Player Demand team, working with publishers and brands to maximize advertising revenue. He has worked in the online space since 1997, and until 2007 served as president of A Simple Internet, a media services firm he founded in 2001 specializing in performance-based marketing. Previously, he was Senior Vice President of Business Development at About.com. He holds a BS in Business Administration from the University of Pittsburgh.

Content owners, including everyone from independent publishers to sports clubs, will continue to expand their video distribution to reach their customers wherever they're watching. From an advertiser perspective, connected TV is one of the most valuable and fastest growing distribution platforms, and I'm predicting TV manufacturers will begin giving their TVs away at sharp discounts or even for free in exchange for controlling that valuable CTV ad inventory.



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SEO-Optimized Video, CTV Targeting, and Editorialized Video Playlists

With hundreds of hours of video uploaded to the internet every second, SEO will be a must-have to cut through the noise and get your videos seen in 2022. Google and other search engines will continue to build new video discovery features and content owners would be wise to keep up with best practices. I'm also expecting advertisers to demand greater reach on connected TV in 2022, which is one of the fastest growing forms of digital video. To better target their ads on connected TV, advertisers will want more granular contextual targeting insights to better align their ads with content that audiences are fully immersed in. My last prediction is that publishers will bring an editorial focus to curating video playlists, which keep audiences engaged longer and maximize monetization.



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**video best practices
for publishers**

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“Connected TV...is one of the fastest growing forms of digital video. To better target their ads on connected TV, advertisers will want more granular contextual targeting insights”

Robert Caliolo, VP of Product

ABOUT ROBERT

Rob has over 15 years of experience working in analytics, product, SAAS, E-commerce, media, and advertising for enterprise-level digital brands and start-ups. He leads an internal team at JW Player focused on improving the products and services used by digital publishers.



The Great Streaming Consolidation



“Large media conglomerates who own multiple streaming services...will consolidate their apps and services to streamline their consumer options.”

Welby Chen, Chief Operations Officer

ABOUT WELBY

Welby Chen is JW Player’s Chief Operating Officer, overseeing the company’s Operations, Customer Success and Sales teams. Welby brings a track record of two decades successfully driving customer acquisition, retention, and revenue expansion in ad tech and video companies. Prior to joining JW Player, Welby served as President and Chief Business Officer of Fyber, a mobile technology company. Earlier in his career, he served as Chief Business Officer at Inneractive (acquired by Fyber), SVP of Global Sales and Partnerships at Vevo, and Global Head of Pricing and Planning at Nokia. He serves on the company’s leadership team and is based in its New York City headquarters.

Over the last decade, there’s been a widening glut of streaming services available to consumers. With growing subscription fatigue, I expect large media conglomerates who own multiple streaming services (both free and paid), will consolidate their apps and services to streamline their consumer options. Audiences will have the option to choose the payment tier that best suits their needs, and in exchange, media companies will have more loyal audiences.



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Broadcasters Step Up to Stop Geolocation Fraud and Piracy

Piracy and protecting valuable content rights will still be a top concern for broadcasters in 2022. We will likely see an increase in geolocation fraud and viewers using VPNs to spoof their location. This violates rights restrictions but also means that broadcasters have to pay bandwidth/CDN fees for “illegal” viewers. There is no silver bullet for combating piracy and a range of technologies should be employed — DRM, Watermarking, and IP Blocking together with investigation techniques to track down the pirates. Broadcasters will also need to make sure that their legitimate feeds provide a higher quality viewing experience than pirated feeds, and perhaps provide a mix of content that’s free-to-air and paywalled content available with fees that are affordable for the region.



“Piracy and protecting valuable content rights will still be a top concern for broadcasters in 2022.”

Camilla Young, SVP of Broadcast Services

ABOUT CAMILLA

Camilla has many years of experience in the streaming industry designing and delivering video delivery solutions for clients across the world. Camilla spent the last 9 years building Vualto Ltd, (and Vualto BV), a company serving Broadcasters, Telcos and Parliamentary clients to deliver Live, VOD and LIVE2VOD solutions at scale. Vualto was acquired by JW Player in summer 2021 where Camilla is now taking a leading role in shaping the future of the Broadcast product offering for JW Player. Camilla believes in a consultative approach when working with prospective clients, drawing on her own technical expertise and background to circumvent marketing ‘fluff’ and deliver real results.

8

Advertisers Gain More Trust in Contextual Targeting



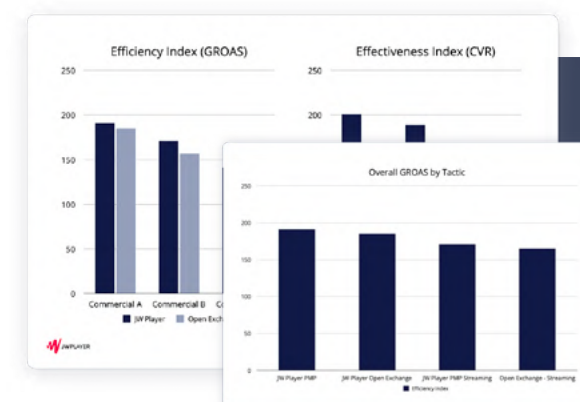
“New contextual targeting methodologies will transition out of the testing phase and into the driver seat of the buying and planning process.”

Michael Schwalb, GM of Data and Partnerships

ABOUT MICHAEL

Michael Schwalb is the General Manager of Data and Advertising at JW Player. In this role, Michael is focused on leveraging the video data generated by billions of monthly impressions across the JW Player network. This unique data helps publishers better monetize their content, and helps advertisers more effectively target their audiences. Prior to joining JW Player, Michael drove revenue, operations, and business development growth at First Data. He has also previously worked in senior leadership roles at PubGears, Tremor Video, and DoubleClick.

In 2021, the prevailing, cookie-based programmatic targeting solutions were challenged and new methodologies were tested, particularly contextual targeting. As advertising dollars continue to make their shift into sight, sound, and motion mediums, these new contextual targeting methodologies will transition out of the testing phase and into the driver seat of the buying and planning process. In addition to programmatic targeting, I believe the industry titans of measurement and ratings will be rivaled by new players that embrace cross-channel datasets for a more comprehensive view of audience engagement.



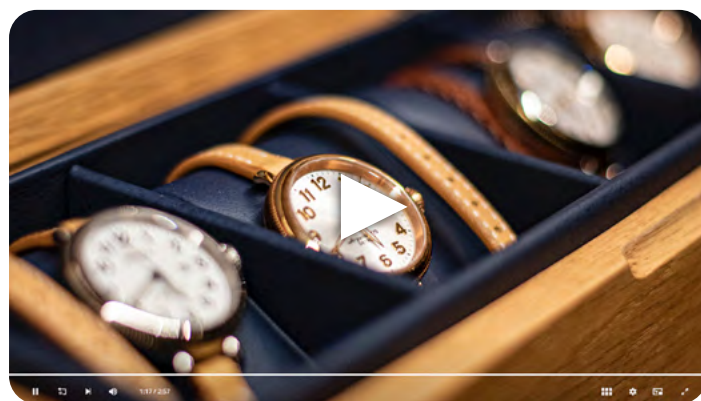
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9

Rise of Live Commerce in Latin America

The pandemic dramatically affected how and where consumers shop which set more retailers and brands on a path to exploring livestream shopping functionality. In Latin America, with the quick modernization of the e-commerce industry and the rapid need to shop online, I expect more brands than ever to adopt new video e-commerce strategies. Livestream shopping will continue to grow with new video functionalities for chatting, reacting, and in-video buying. Across major Latin American markets, I expect brands and businesses to launch owned content platforms where they can better control the shopping and streaming experience.



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“Livestream shopping will continue to grow with new video functionalities for chatting, reacting, and in-video buying.”

Adrian Behr, Sales Director LATAM

ABOUT ADRIAN

Adrian Behr joined JW Player in 2021 to accelerate growth in the Latin America Region. Adrian has more than a decade of experience in the digital domain at media, digital advertising, & ad tech companies. Adrian was previously the Latam Country Manager at Smart Ad Server Latin America where he founded and managed both Buenos Aires and Mexico headquarters. He has previously worked as Country Manager for FON in Brazil and served as operations manager at Lenovo Argentina. Adrian holds both a master's degree in Marketing and Communication from University of San Andrés and a B.S. degree in Business Administration from the University of Buenos Aires.

10

The Growth of Quality E-Learning in India



“The demand to provide quality online education has soared 10x times [in India], skyrocketing the E-Learning industry five years ahead in just two years.”

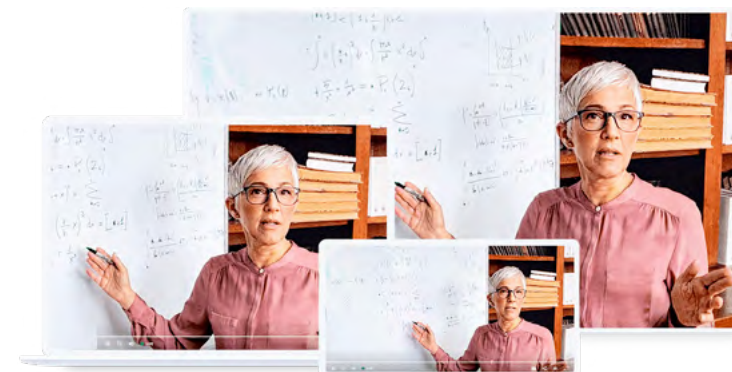
Aizaz Shaikh, Sales Director, India & SAARC

ABOUT AIZAZ

Aizaz joined JW Player in 2021 to accelerate JW Player’s growth in South Asia. Aizaz has more than a decade of experience in the Content Delivery, Hosting, and Web security industry. He served as the former Strategic Account Executive at Limelight Networks where he was responsible for increasing the CDN market share of Limelight within the PAN India. He has previously worked with AWS and holds an Engineering Degree in Electrical and Electronics from VTU University India.

With the pandemic shutting down most of the schools and colleges in India, the demand to provide quality online education has soared 10x times, skyrocketing the E-Learning industry five years ahead in just two years. Companies are feeling immense pressure to provide quality video experiences with the limited resources they have at hand—with a strong focus in the years ahead on features such as content protection, gamification, and a deeper understanding of analytics.

With the recent increase in illegal content sharing across Telegram and other outlets, there is an increased demand for products like DRM, Tokenization, and offline DRM. Gamification within digital apps is also becoming important in order to keep users engaged with features like polls, chats, Q&As, and whiteboard sharing. Educators are also leaning on analytics in order to track individual user engagement on their platforms and will be increasingly important in the year ahead.



Learn more about
eLearning video solutions

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About JW Player

JW Player is the most powerful & flexible video platform powered by the fastest, most-used HTML5 online video player. We combine world-class software with unique data insights to help digital businesses deliver amazing video experiences, grow audiences, and maximize revenue. JW Player pioneered video on the web over a decade ago and continues to innovate as the world's largest network-independent platform for video delivery and intelligence.

2021 was a pivotal year for JW Player, a year that saw the company raise **\$100M** in funding as it expanded its platform to empower content owners in the accelerating digital video economy. In June, JW Player **acquired VUALTO**, a leading video streaming and DRM solution provider, and fully integrated its broadcast offerings into JW Player's video platform and made them available to its global customers: **Broadcast Live and Studio DRM**. JW Player also forged partnerships with **Applicaster** and **PulsePoint** and launched industry-first innovations, including the first **OMID-compliant HTML5 video player** and a patent for **real-time ad viewability** technology.



Grow your business with JW Player's **flexible platform of video services**, powered by billions of signals from across our vast network.

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