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JOURNAL

A SECURE



AI WORLD?

How AI is being used both by and against the industry

SECURITY SOLUTIONS

Where and how AI is being used to attack and protect M&E

SMART CONTENT

Massive amounts of data now required new tools, including AI

23.02

SECURING ENTERTAINMENT'S EMERGING TECH STACK

Learnings from Altman Solon's 2023 Video Production Survey

ABSTRACT: The media and entertainment industry has continued to evolve over the last three years, accelerating the development of new processes and capabilities. In parallel, data security concerns grew for product teams and media companies expanding their tech stack. Findings from Altman Solon's latest emerging technology study shed light on adoption trends, strengths, and potential challenges with new media solutions, including virtual production, IP-based workflows, and artificial intelligence. How should media executives toe the line of managing security concerns with the increasing need to foster growth and innovation?

By Derek Powell, Director, Altman Solon

The media and entertainment industry has undergone massive changes over the past three years. The global pandemic upended legacy production methods and mainstreamed digital tools that cut costs, facilitate remote collaboration, and speed up deadlines. As Virtual Production (VP) processes, IP-based workflows, and generative AI tools take their place in the entertainment industry's tech stack, concerns about data security are growing. This past summer, we spoke to more than 300 production executives across the U.S., Canada, the EU, and the UK, to better understand the state of adoption of these cutting-edge production technologies.

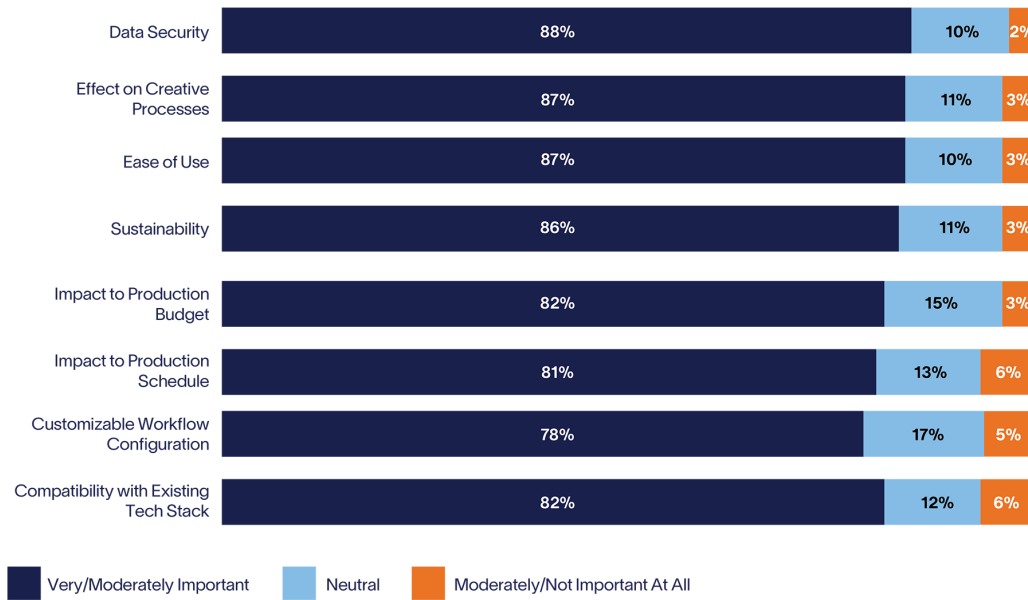
Our findings, which are part of our third annual Emerging Media Tech Survey, show that even though these tools are understood to be innovative and potentially game-changing for the industry, data security is the elephant in the room. Ultimately, widespread implementation of these tools will hinge upon accommodating security directly into the product.

VIRTUAL PRODUCTION AND AI: FEARS AROUND DATA SECURITY, COPYRIGHT, AND PIRACY ARE MAJOR HURDLES

While VP tools can eliminate the need for location shots, allow for borderless collaboration, and save money on post-production, they can increase security risks across the video production process. That's why over half of survey respondents say data security is "very important" when using the technology. Nearly 60 percent of

How important are the following aspects when considering and/or using virtual production technology capabilities ?

% of respondents selecting importance of tools, n = 145



Altman Solon sought insight into the top industry concerns and desires around virtual production capabilities and found data security topped the list.

respondents consider data security moderately or very challenging when implementing VP technologies.

Despite facilitating remote collaboration, projects across multiple worksites are exposed to greater risks. Moreover, VP tools depend on cloud-based off-premises workflows, which can, in turn, create security vulnerabilities. At a time when streamers spend record sums developing and producing original content, any vulnerabilities that might enable content theft undergo heavy scrutiny. While VP is still in the early stages of maturity, poor data security could slow or stop implementation.

The rise of AI in the entertainment industry is subject to fierce debate and was at the center of both the Writer’s Guild of America strike and the Screen Actors Guild strike. Despite this, AI tools are already being used by studios for caption and transcription generation, narration, editing, and show-stopping special effects — including “de-aging” stars like Harrison Ford for *Indiana Jones and the Dial of Destiny*. More than 60 percent of survey respondents cited “cost savings” as the main motivator for adoption; however, most indicated

that their AI tech stack — including data, models, and deployment capabilities — is stored on-premises or in colocation facilities. The total control over hardware, security, and set-up offered by these on-premises solutions is preferred by production executives.

Anxieties over potential security breaches, data quality, content piracy, and DRM bypass were cited as concerns by respondents when it comes to adopting AI tools. These tools, which are still in their infancy, also raise questions about copyright infringement and authorship. Upcoming rulings on court cases, like the one brought by Getty Images against Stable Diffusion for copyright infringement, are certain to provide a framework for legal boundaries on AI use, but today, media and entertainment companies remain in the dark.

Media and entertainment companies’ awareness of the inherent security risks in new production technologies means they can develop and adapt cybersecurity protocols for maximum data and content protection. Investing in data security tools and technologies to prevent future

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“THERE HAS ALWAYS BEEN THIS VIEWPOINT – if we move to a more modern stack with more consolidation will that expose us to more attacks like DDOS or DNS hijacking?” — VP of IT, major TV station

breaches is a priority for the industry and essential for successful implementation of virtual production protocols and AI tooling.

MOVING FAST AND STAYING SAFE

The streaming bubble has burst, with media and entertainment companies facing multiple challenges. While many are turning to innovative technologies to speed up production and cut costs, they are not immune to the risks of data breaches and copyright infringement.

Digitally native companies- including streamers and Free Ad-Supported Streaming (FAST) television networks – are already working to protect consumer data (thanks to GDPR and CCPA regulations) and their digital assets. As such, they are well positioned to apply these best practices as they expand their tech stack. There is no one-size-fits-all solution to ensuring growth and innovation while maintaining strict data security. However, production and distribution professionals should keep the following guidelines in mind:

■ *Minimize the chain of custody and double down on security protocols: As production teams embrace collaborative, digital tools, studios need to keep the people who have access to proprietary data at a bare minimum. Service providers should be subject to strict access control. Solutions like zero-trust security protocols should be*

developed and influenced in addition to quantum-safe encryption.

■ *Embrace the hybrid cloud: While on-premises infrastructure may be cheaper in the short-term and easier for studios to set up, AI infrastructure will certainly involve high-performance computing, and will force entertainment companies to expand to a hybrid public/private cloud set-up. Decision-makers should weigh each type of infrastructure model based on their needs for security, capacity, cost, flexibility, and choose accordingly.*

■ *Standardize ethical guidelines for AI tools: While regulations on AI are still being written, media and entertainment companies should develop internal guidelines that ensure AI use is done ethically. This can include disclosing AI use in products and establishing internal AI review bodies. Any AI tools in use should be subject to strict scrutiny.*

Gone are the days when a stern FBI warning at the beginning of cassette tapes and DVDs was sufficient protection from pirating. In a time when Universal Pictures’ Super Mario Brothers was leaked in full on Twitter ahead of its theatrical release, data security for valuable intellectual property has never been more highly prized. Embracing a new digital tech stack means integrating security within the tools, the processes, and the storage facilities. ■

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