



SVG

TRANSPORT

MICROSOFT TECHNOLOGY CENTER, NYC • OCTOBER 16, 2018

MVPDs

Streaming Devices

Smart TVs

Game Consoles

Platforms & Delivery

Ad Networks

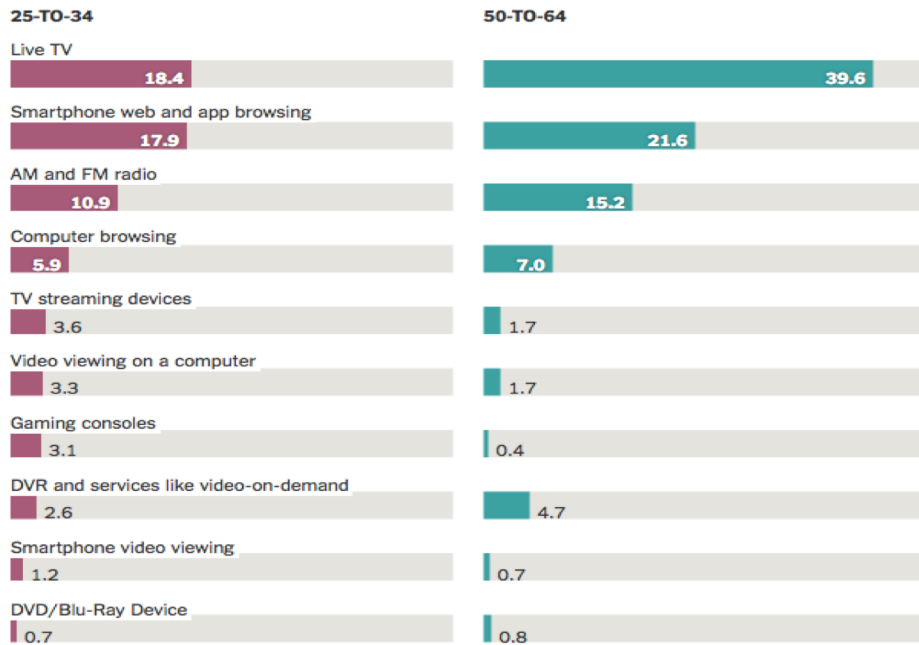
Web TV Services

Streaming Services



A Generational Gap in How Americans Consume Content

Here's how many hours per week younger and older Americans are spending on different platforms.

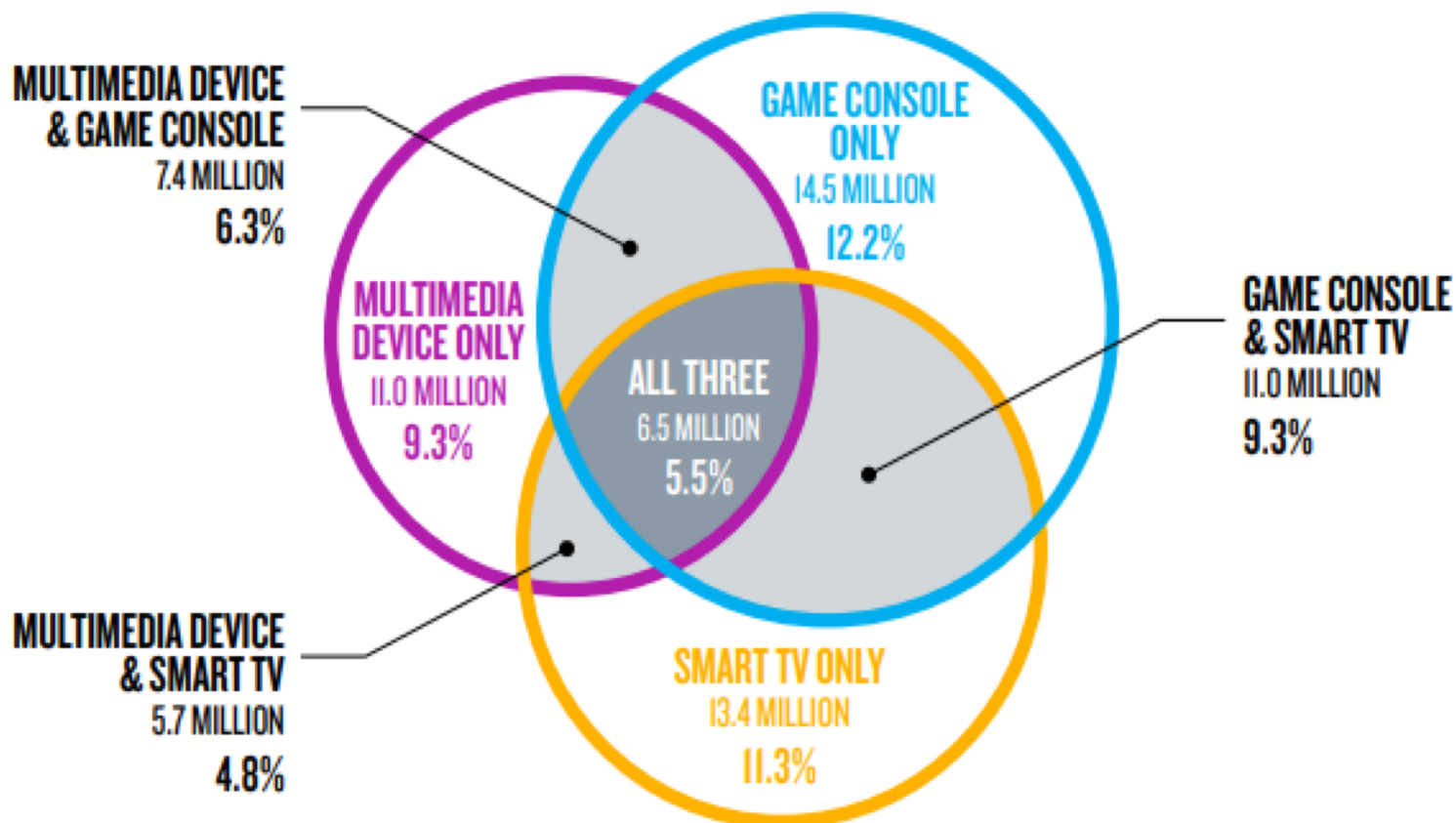


Live TV includes playbacks within seven days. TV-connected streaming devices includes viewing through Roku, Apple TV, smartphones and computers. Game consoles includes time spent playing and watching content. Smartphone video viewing is specific to video-centric sites and apps like Netflix.

By The New York Times | Source: Nielsen Total Audience Report, Q2 2017

HOUSEHOLD OWNERSHIP OF ENABLED DEVICES (ONE, TWO OR THREE)

Of the 58.7% of TV Households that have an enabled device...



DIVING IN

Traditional media giants are steadily expanding direct-to-consumer ventures. Here's a look at major domestic efforts to date:

**Disney's
entertainment
streaming service**

	DramaFever	CBS All Access	Showtime	HBO Now	NBC Sports Gold	Starz	Disney's entertainment streaming service
OWNER	WarnerMedia	CBS Corp.	CBS Corp.	WarnerMedia	NBCUniversal	Lionsgate	Disney
LAUNCH DATE	2009 (Warner Bros. acquired in 2016)	Oct. 16, 2014	July 2015	April 12, 2015	2016	April 5, 2016	Q4 2019
SUBSCRIBERS	n/a	2.5 million+	2.5 million+	5 million+	n/a	3 million+	n/a
MONTHLY FEE	\$1-\$10	\$6-\$10	\$11	\$15	Varies by sport/season	\$9	n/a

Delivers a lineup of Korean-language film and TV series

CBS was the first of the Big Four to go all in on streaming, offering live local and network feeds by region plus a vast library of TV evergreens. It also offers the CBSN and CBS Sports HQ offshoots. An "Entertainment Tonight"-branded channel bows soon.

The stand-alone version of Showtime has grown at a solid clip.

The dawn of HBO Now marked the first break with the traditional cable bundle from the pay-TV industry's old guard of programmers. AT&T intends to use HBO's brand name to help market other subscription services.

Live streaming of Premier League soccer, cycling, rugby and other sports

The stand-alone streaming app has helped ease Starz's net subscriber losses.

Disney's big swing at turning its portfolio of gold-plated brands into a global streaming platform

	FilmStruck	Noggin	Laugh Out Loud	ESPN+	DC Universe	Fox Nation	
OWNER	WarnerMedia, Criterion Collection	Viacom	Lionsgate	Disney, Hearst	WarnerMedia	21st Century Fox	
LAUNCH DATE	Oct. 19, 2016	May 2017	Aug. 4, 2017	April 12, 2018	Q3 2018	by December 2018	
SUBSCRIBERS	n/a	n/a	n/a	n/a	n/a	n/a	
MONTHLY FEE	\$7	\$8	n/a	\$5	\$8	n/a	

Turner Classic Movies teams with the cineastes at Criterion to curate the ultimate collection for students and scholars of film.

A commercial-free feed of preschool programming for the generation of kids raised with screens in their hands

A comedy-focused service curated by Kevin Hart

The streaming complement to the linear sports giant allows users to tailor programming according to interests and favorite teams.

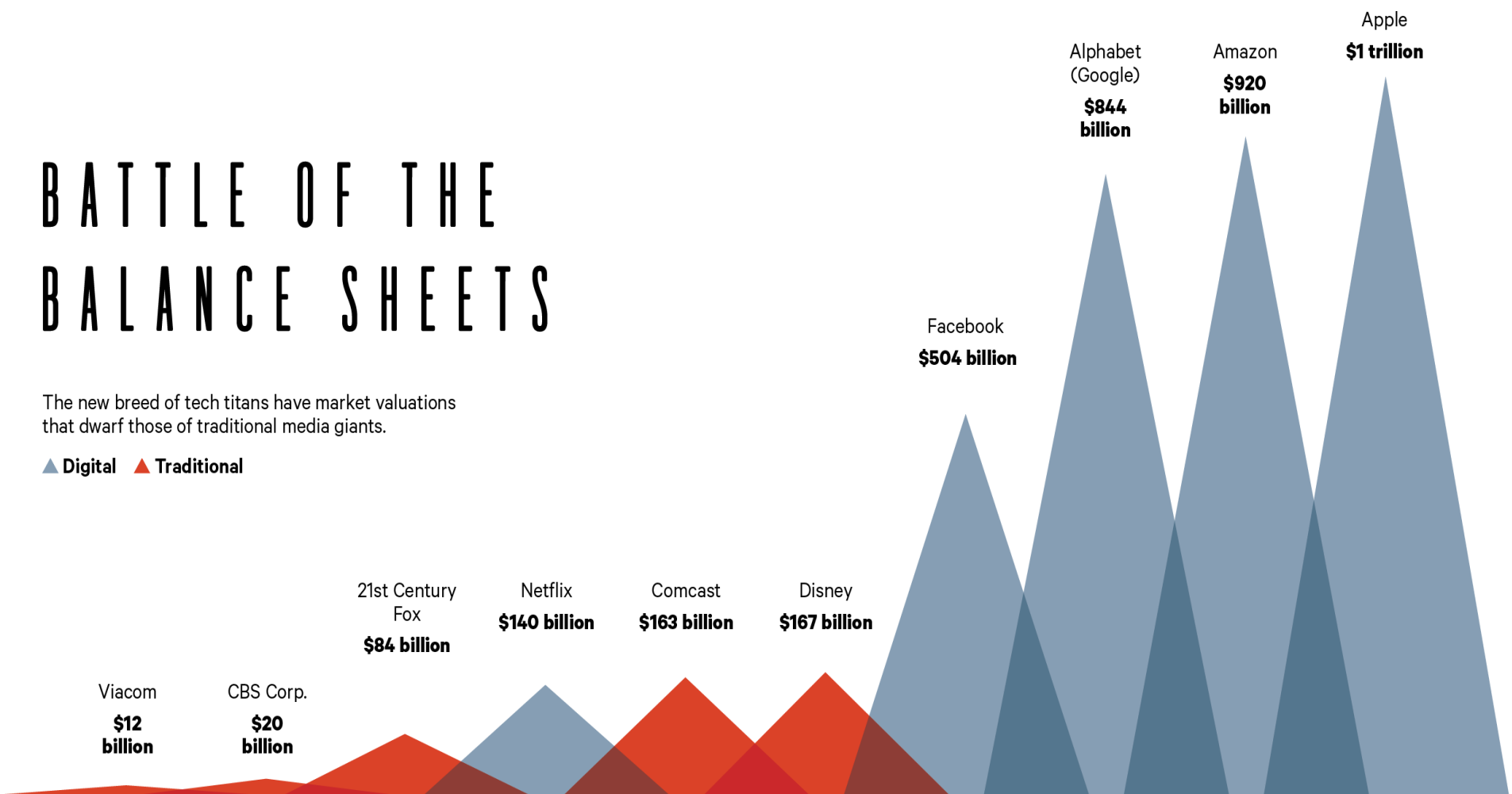
Warner Bros. hopes a mix of original and vintage DC-related content will draw the Comic-Con crowd.

Designed to serve up commentary and opinion programming, live streaming and long-form programs to Fox News superfans

BATTLE OF THE BALANCE SHEETS

The new breed of tech titans have market valuations that dwarf those of traditional media giants.

▲ Digital ▲ Traditional



- America now counts 8.8 connected devices per household. (60 million overall)
- One in three households has cut the cord
- Four in 10 "light" TV viewers are "heavy" OTT consumers
- Streaming viewership has increased 30% year over year, while linear viewership decreased 6% over the same period (42 hrs OTT vs 132 hrs TV)

WHAT'S NEXT?



WHAT'S NEXT?

	ATSC 3.0	5G
Spectrum	600 MHz band	Regulated and non-regulated frequencies including 1–6 GHz and 26, 28, 38 and 60 GHz band could be used.
Regulatory Status	Standards set; FCC has approved rollout	Final standards due in 2019
Start Date	Field trials in 2018; rollout starts in 2019	Limited test services in several markets. Rollout to begin in 2019
Technology	Broadcast	Unicast
Internet of Things	Fixed and automotive/mobile	Mobile and fixed. Small cell interaction
Video Features	Multichannel linear; enhanced TV capabilities	On-demand broadband video; low latency
Suppliers/Partners	30 technology companies; 100+ expressing interest. Among the early suppliers are LG, Samsung, American Tower, Dielectric, Enensys, GatesAir, Harmonic and Triveni Digital.	All major U.S. wireless carriers will offer 5G. About 20 carriers (globally) plan to offer it. Qualcomm, LG, Samsung, Sony, HTC and dozens of other telecom suppliers ramping up production.



THANK YOU