

MIT Research Lab of Electronics

Digital Media in 2011

Presented by

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- Previously strategy consultant, focused on media, technology and communications



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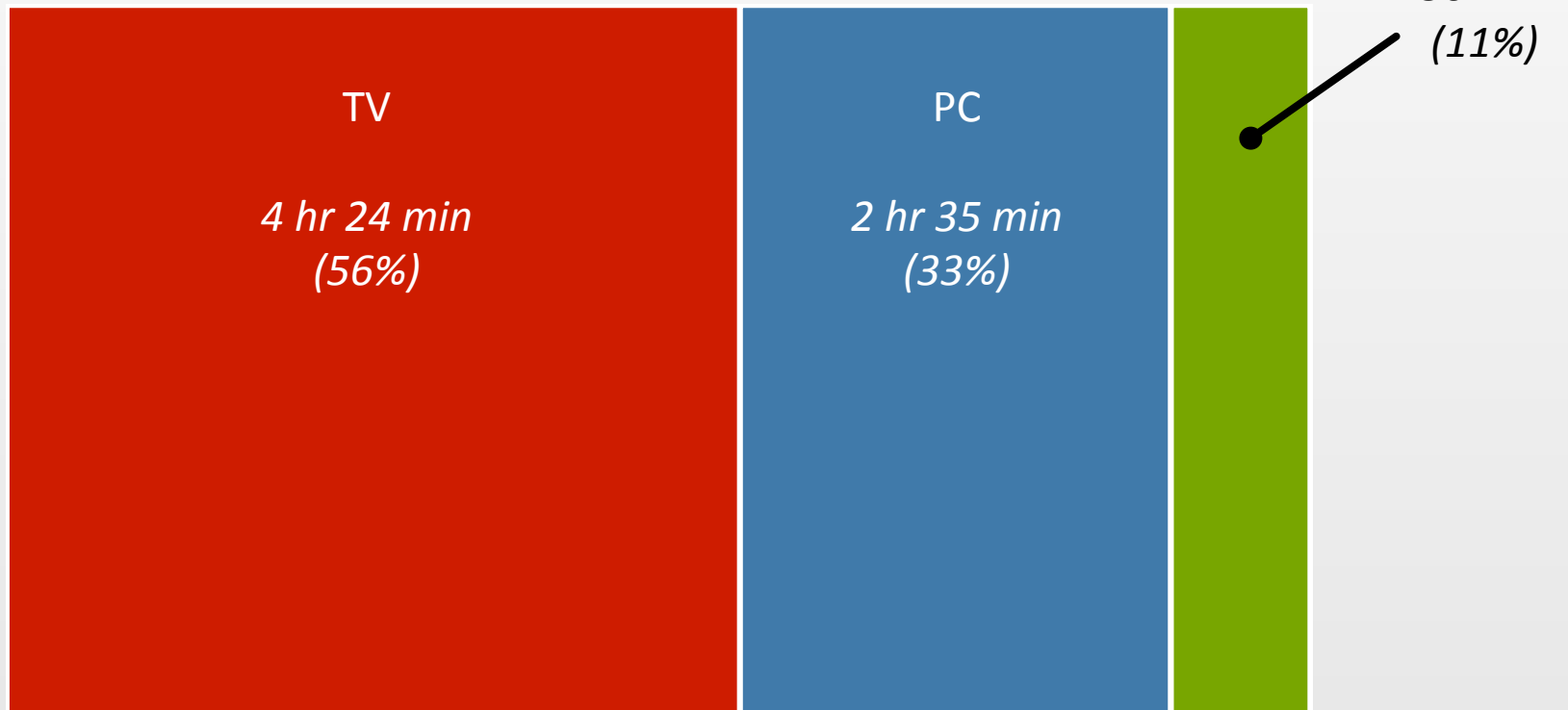
- Industry Trends
 - Connected Devices
 - Apps Everywhere
 - World of the Web
- HBO Overview
- Q&A

So, what's
next for
television?



- People spend 8 hours a day in front of a screen

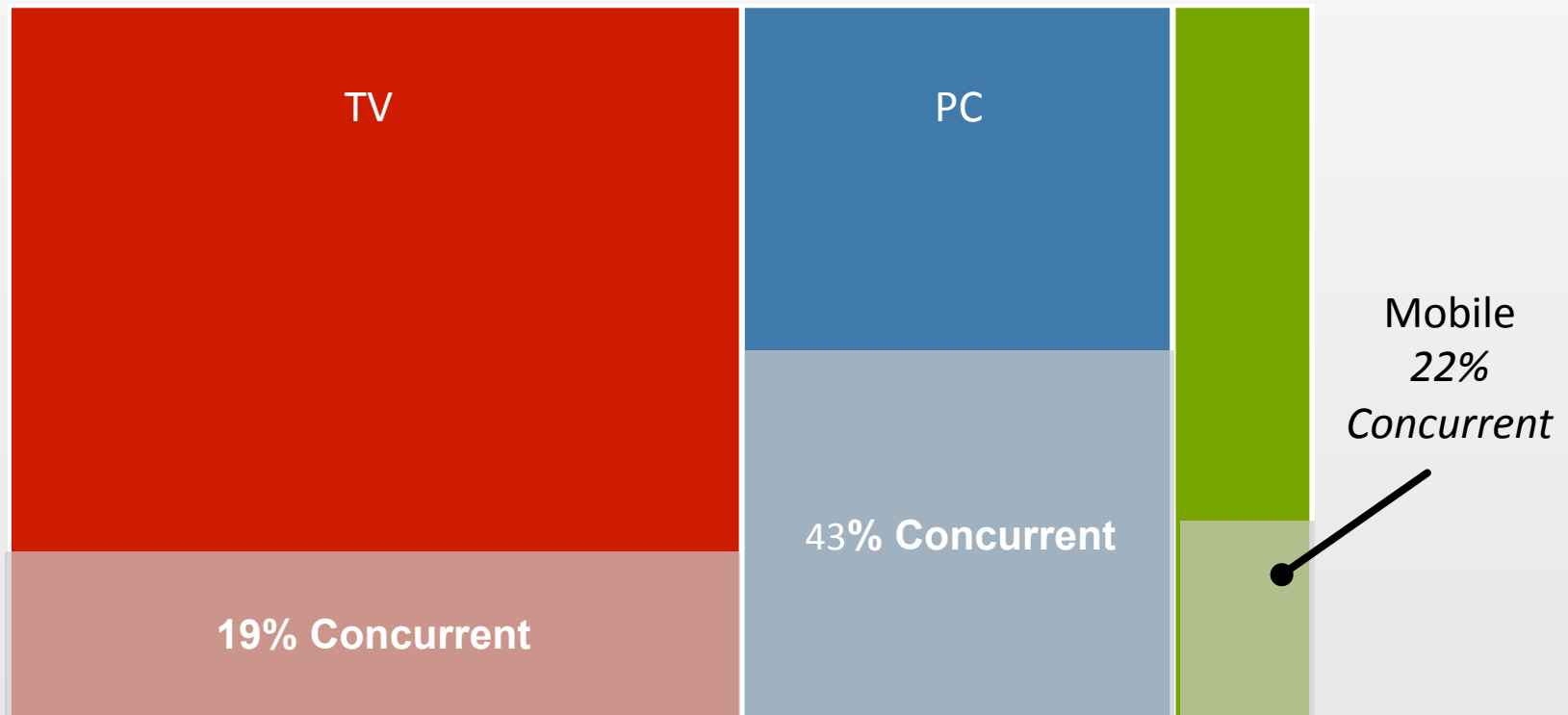
Average Daily Screen Time, US



Source: eMarketer, Accenture analysis

- Concurrency puts the actual time closer to 6 hours

Average Daily Screen Time, US



Source: eMarketer, Accenture analysis

Explosion in web-to-TV connectivity

Connected TV



PC-TV Link



Console



BluRay Live



'Media hubs' are only an interim solution, before features become loaded as standard

MSO STB



Next Gen STB



Cable technology – STBs with web

- Comcast Spectrum: improved search, VOD apps & social integration





Likely to see disruption in TV that follows the mobile model post-iPhone:

- smart, connected devices
- growing usage of apps
- complemented by browser usage
- next generation input controls
- new media content and format

Need all the moving parts to work...



Input Mechanism

Display device

Additional Hardware (e.g. STB)

Transport (e.g. BB, wireless, physical)

OS / Platform

App Stores and Browser

Video Content (linear, VOD, i/active)

Other Services (e.g. search, social)

Each constitute a potential 'failure point' and also required are the coordination of all backend

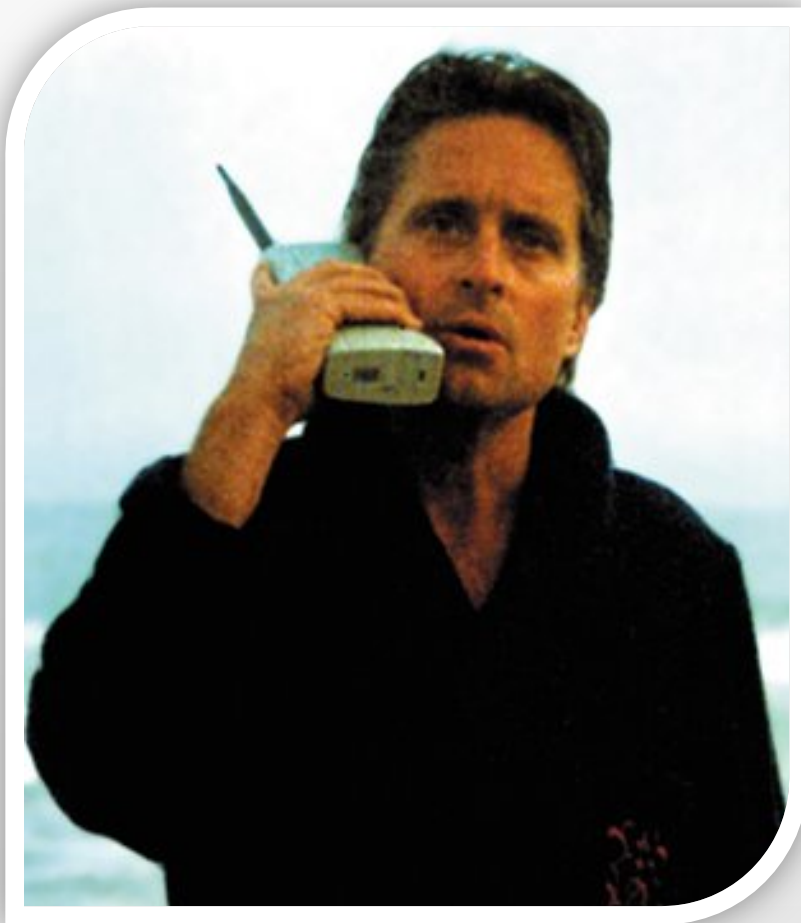
*Additional needs, incl. standard, formats, DRM, authentication, CMS, commerce etc etc

So, what's
next for
phones
and
mobile?



Now 'mobile' is more than just phones

- From this...to this in just over 20 years...

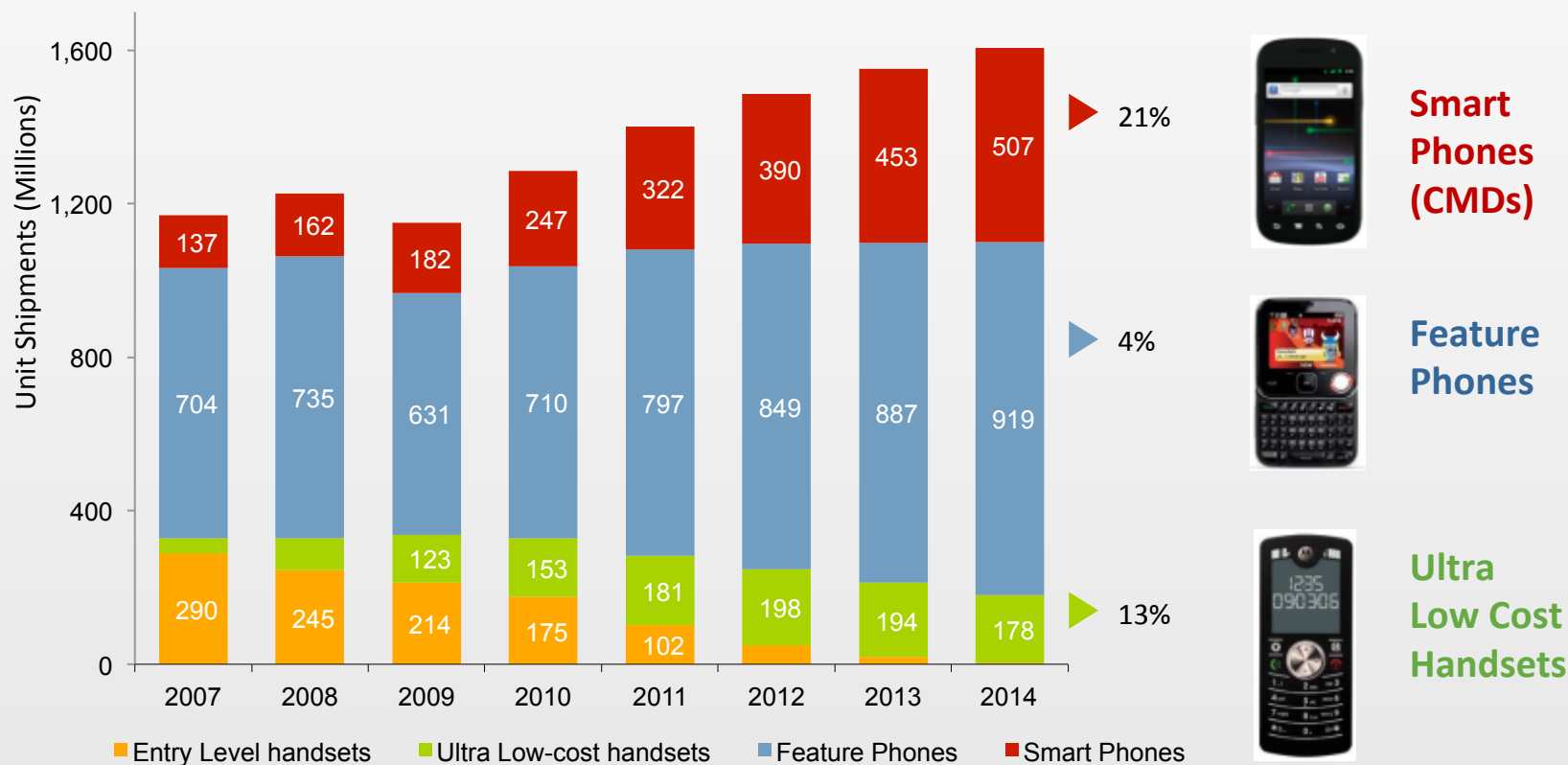


Smart phones booming

- Phones capable of mobile web and apps dominate

Annual Mobile Device Shipments (Global)

2009-14 CAGR



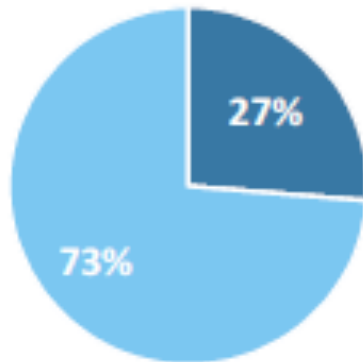
Sources: iSuppli, Accenture analysis

Smartphone and mobile OS share

- Despite assertions, Apple does not rule the world

U.S. Smartphone Penetration

Source: comScore MobiLens, 3 mo. avg. ending Dec-2010

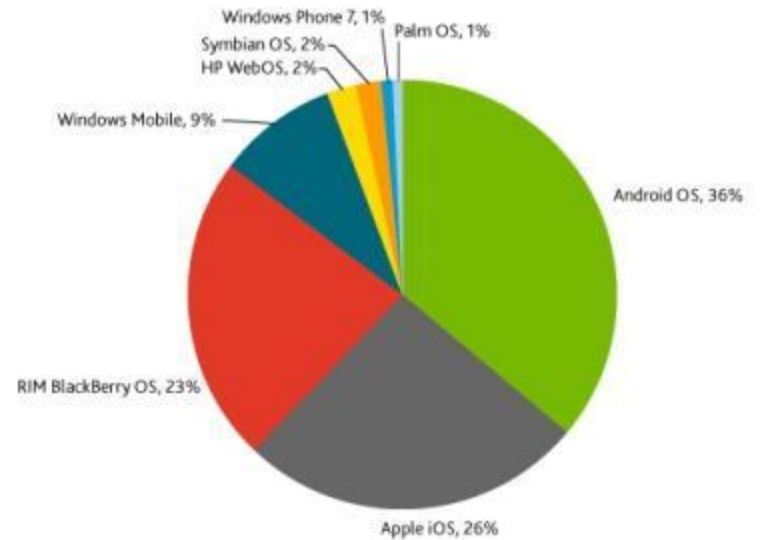


■ Smartphone ■ Non-Smartphone



Smartphone Share

Feb - Apr 2011, Nielsen Mobile Insights, National



Source: Nielsen

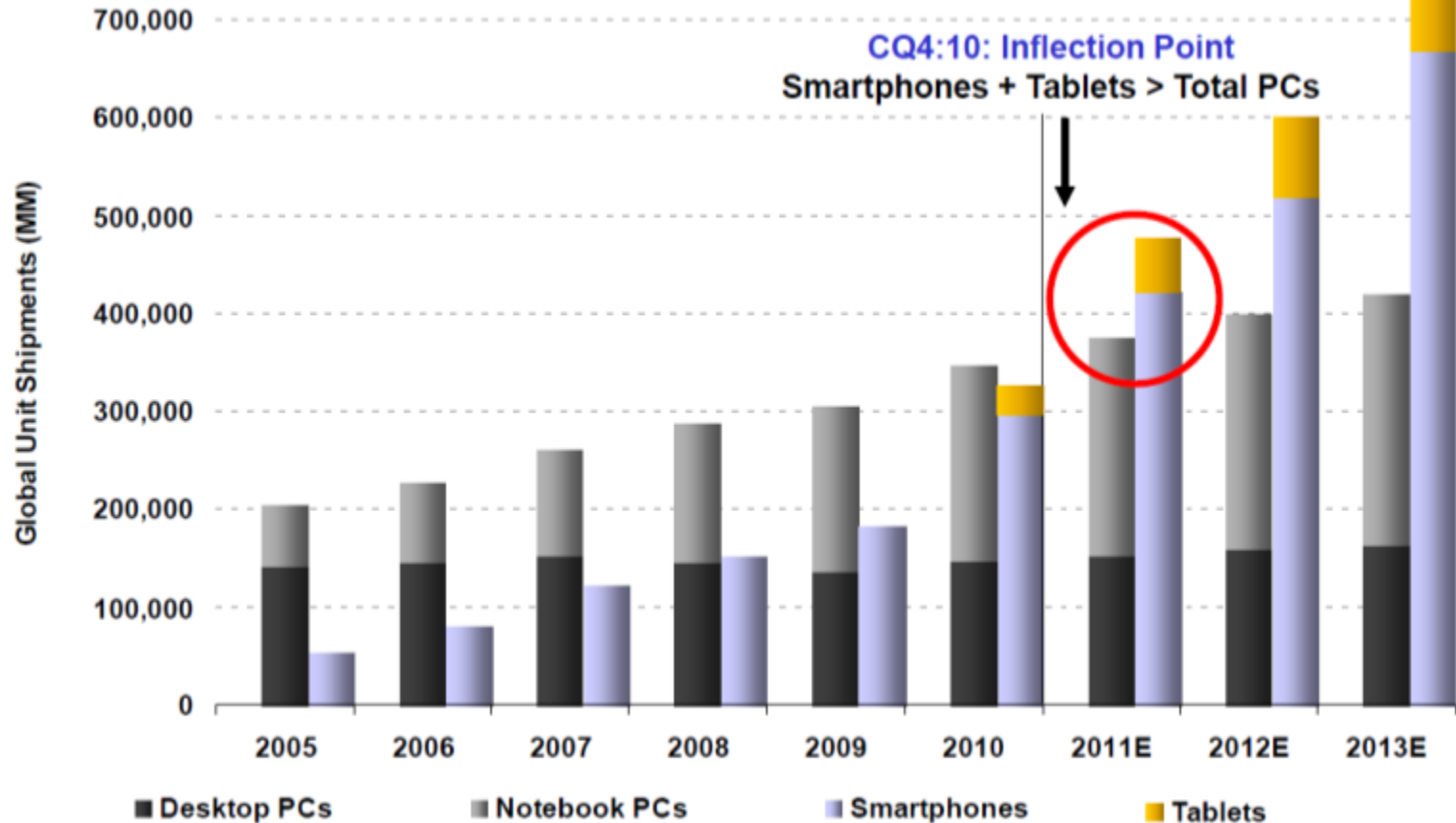


Generational shift in computing...



Smartphone + tablets > PCs

Global Unit Shipments of Desktop PCs + Notebook PCs vs. Smartphones + Tablets, 2005-2013E



Note: Notebook PCs include Netbooks. Source: Katy Huberty, Ehud Gelblum, Morgan Stanley Research. Data and Estimates as of 2/11

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The Big Apple



Steve Jobs' master plan revealed?



How are
people
getting
content?





Software the new hardware: apps > devices



Historically

TV



Phone



MP3 Player



Camera



Credit Card



2011 and Beyond

Video



Voice



Music



Images



Payments



MOBILE APP STORES

Device Manufacturer



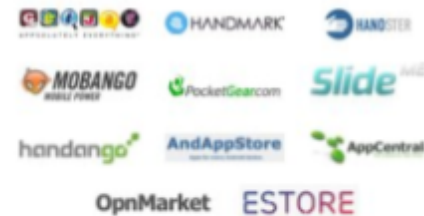
OS Developer



Operator



Independent

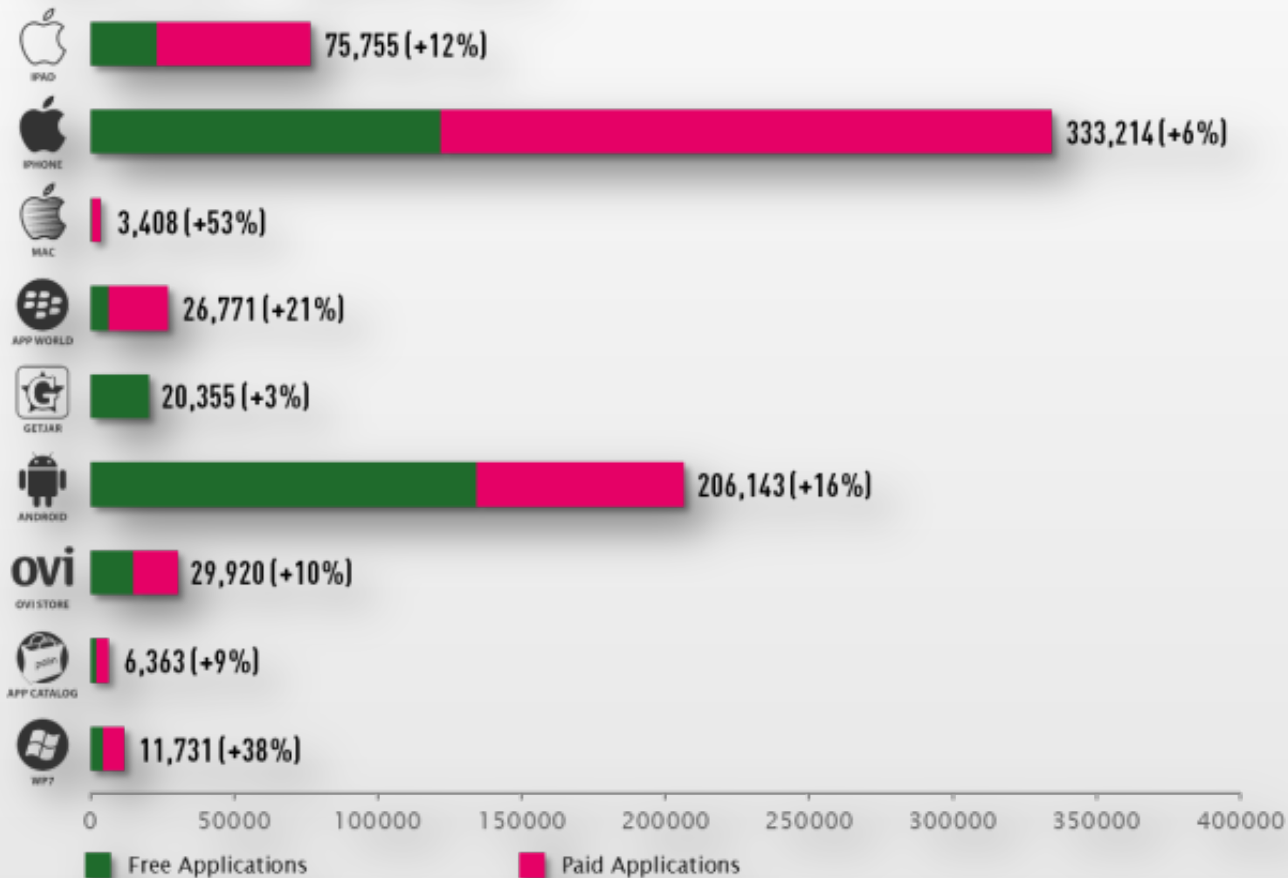


App store facts & figures

NUMBER OF AVAILABLE APPLICATIONS

DISTIMO

MARCH 2011 – UNITED STATES



Samsung TV Apps



Vizio Internet Apps

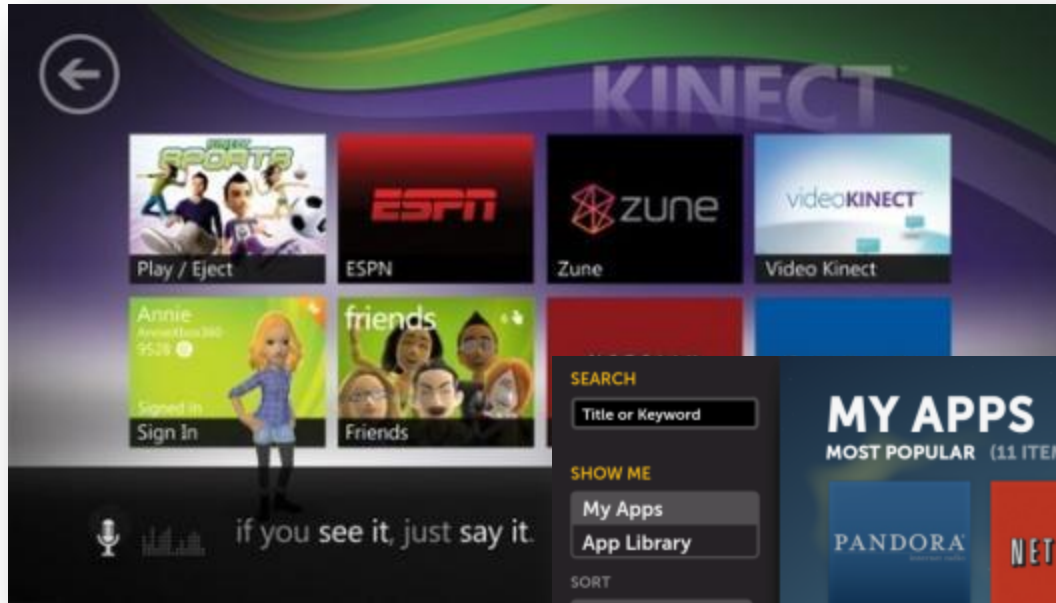


ANDROID MARKET FOR GOOGLE TV OPEN THIS SUMMER



Console and media hub app stores

X-Box 360 Apps



Boxee Apps



What's
new on
the web?

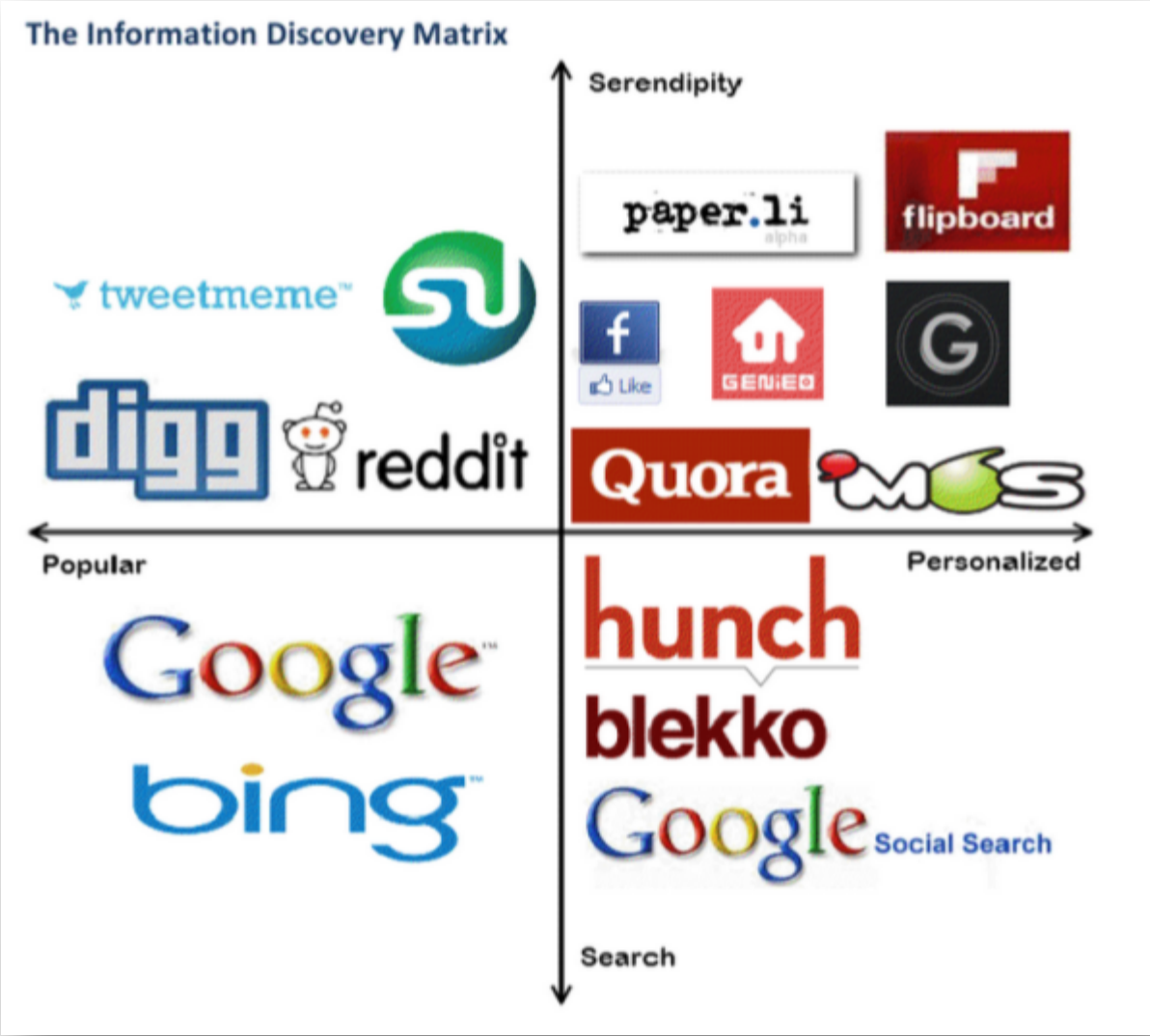


Roll tape...



<http://www.youtube.com/watch?v=3SuNx0UrnEo&feature=related>

Search – beyond Google





<< Social media is like teen sex. Everyone wants to do it. Nobody knows how. When it's finally done there is surprise it's not better... >>

- Avinash Kaushik - Analytics Evangelist, Google

Social everything...



Social browsing

Social email



Social everything...



Social shopping



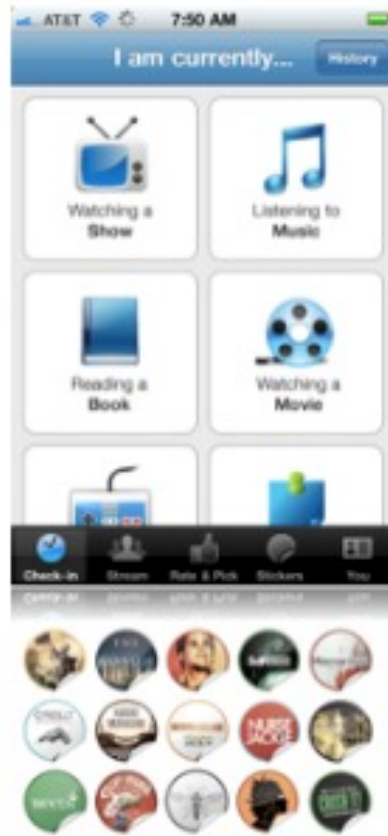
Social gaming

Content and brand 'check ins'

Location



Content



Brand



Consumer

- How people **search/discover**
 - e.g. social recommendations (Twitter, Jinni, Miso)
- How people **view content**
 - e.g. group viewing (ESPN/X-Box, Epix HD)
- How people **share and buy media**
 - e.g. commerce, clips, gifts (Facebook, Boxee, iTunes)

Enterprise

- How to enable the above (e.g. **metadata, DRM, authentication, asset management** etc.)
- Impact to **brand control vs. targeted marketing**
- **Data, CRM, privacy** implications
- Fundamental **shift in business model, technology, culture**

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TV Everywhere – HBO GO



HBO GO What is HBO GO? Sign Up Help Sign In

Preview Home Movies Series Comedy Sports Documentaries Late Night Search

HBO GO
Free with your HBO® subscription.
Get unlimited access to over 1,400 of your favorite HBO shows, including HBO original programming, hit movies, sports, comedy and more. Plus, get bonus features and special behind-the-scenes extras. [More Info](#)

Sign Up Sign In Take a Tour

It's HBO. Wherever You Go. [Learn More](#)

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Boardwalk Empire
Season 1 Catch-Up
the complete first season.
Season 2 premieres September 25.

Boardwalk Empire: Season 2 Trailer Boardwalk Empire Season 1 Series Finale Entourage Season 8 / Ep 96 True Blood Season 4 / Ep 48 Curb Your Enthusiasm Season 8 / Ep 80 HBO Emmy® Winners Bury My Heart at Wounded Knee 24/7 Mayweather/Ortiz Hereafter Game of Thrones Killing in the Name A Fish Called Wanda The Peep Show

Watchlist 0 ▲

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HBO GO goes mobile



HBO GO
It's Here.

HBO employees can access HBO GO anytime, anywhere from any device.

Get instant and unlimited access to every episode of every season of the best HBO shows, movies, comedy, sports, and documentaries at HBOGO.com or on your iPad®, iPhone®, or Android™ smartphone device.

Is your cable provider not yet supported? No worries, you can login with your HBO email address and password. Just go to hbo.com/vip on your desktop and SIGN IN. On the mobile applications, choose OTHER from the provider menu.

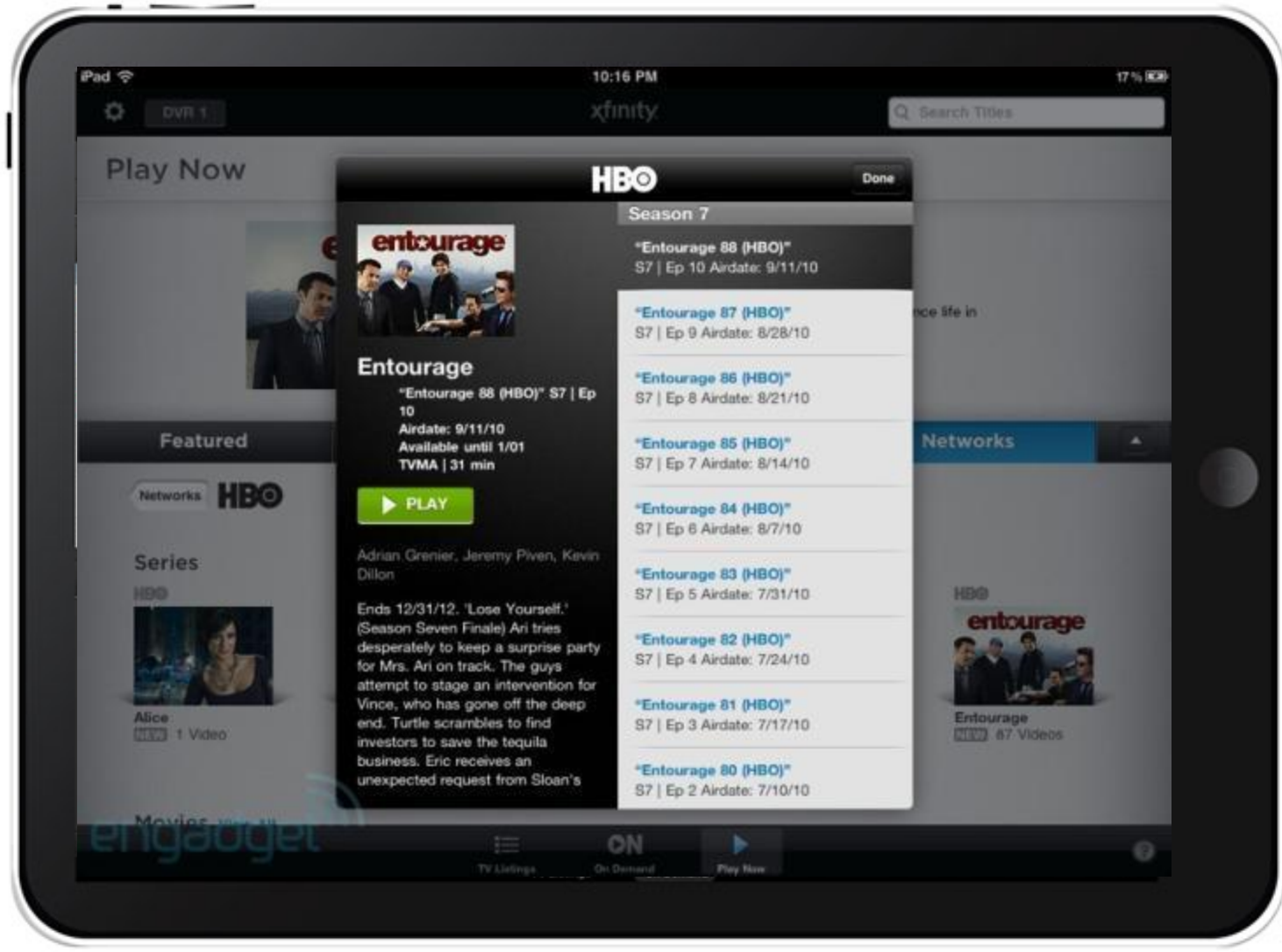
[EXPLORE HBO GO](#)

Follow @HBOGO on Twitter

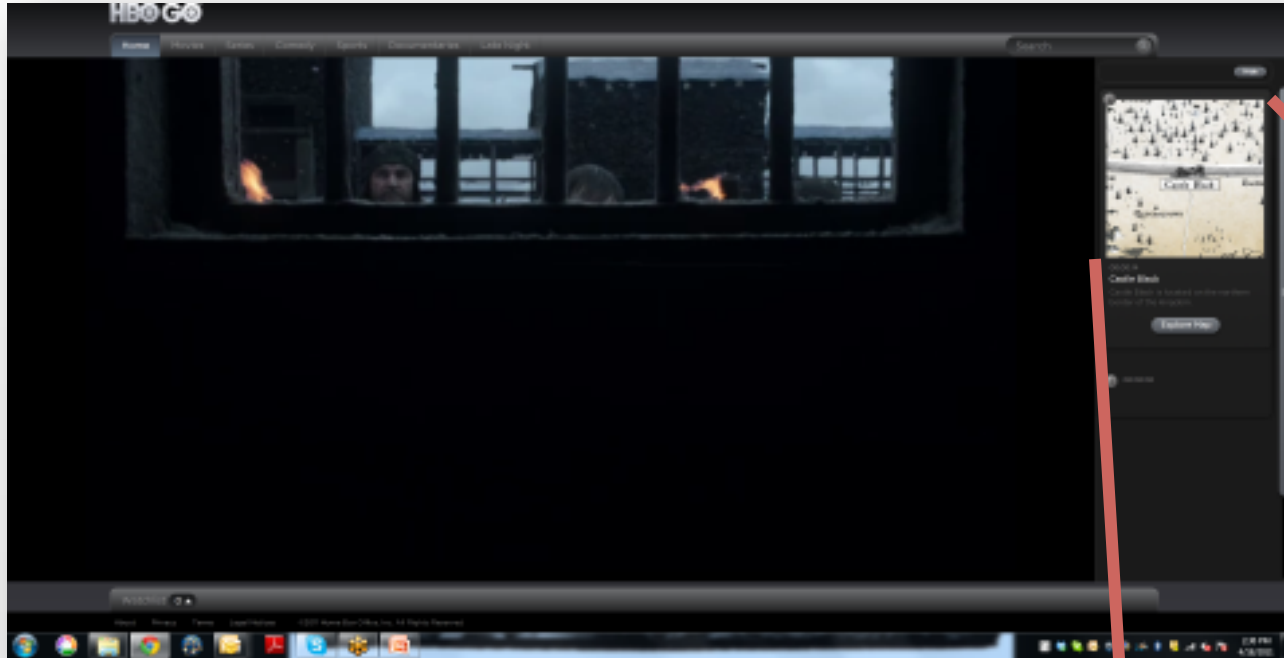
HBO GO® is only accessible in the US where a high speed broadband connection is available. Minimum 3G connection is required for viewing on mobile devices. Some restrictions may apply.

- Summer 2011
- iPad, iPhone, Android
- National marketing campaign
- 1,400 hours of content
 - TV and movies
- Authenticated, TV Everywhere product
- #1 on iTunes

Affiliate mobile – Xfinity iPad app with HBO



HBO GO extras – e.g. Game of Thrones



- Value added content (e.g. interactive maps) bound to real-time video playback on HBO GO




'Traditional' social media...



facebook Home Profile Account

True Blood Like

TV Show Create a Page

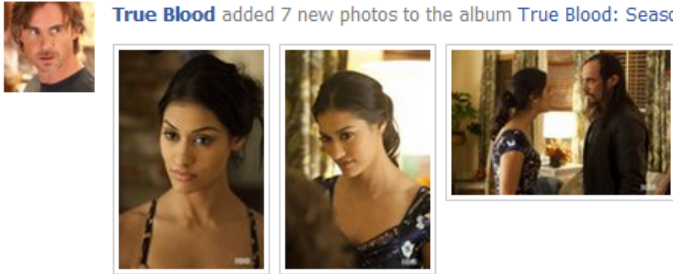


Wall True Blood · Everyone (Top Posts)

Share: Post Photo

Write something...

True Blood added 7 new photos to the album True Blood: Season 4: Luna.



True Blood: Season 4: Luna

Like · Comment · Share · 2 hours ago

7,089 people like this.

View all 580 comments

Write a comment...

TRUE BLOOD
SEASON 5
SUMMER 2012
ONLY ON HBO
#trueblood @truebloodhbo

- Wall
- Info
- Immortalize
- Blood Line
- Watch Videos
- HBO GO

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WATCH FULL PROGRAMS

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To participate in the conversation, you'll need to sign in through Twitter.
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Check-in 6
Check-in and unlock exclusive GetGlue stickers

Live Feed

ALL HBO BOXING TWEETS Filter Tweets on Page

SYSTEM WILL AUTOMATICALLY REFRESH NEW TWEETS PAUSE

@AdayGloton
@hboboxing Sergio is on another level, with respect to Barker. The real number 2 P4P. Chávez? NO. We want Maravilla vs Mayweather Jr.
Mon Sep 19 15:09:18 2011

@knightweets
@AmirKingKhan sweet awesome .. Keep rocking mate
Mon Sep 19 15:09:15 2011

Official Updates

No Fear. No Mercy. Sergio @maravillabox Martinez vs @DarrenBarker82 airs 10/1 10PM ET @HBO. Who will win? POSTER.
<http://t.co/Bn75B7z6>

Tweet 16 32 minutes ago

No Fear. No Mercy. Sergio Martinez faces off with Darren Barker Saturday October 1st at 10PM

HBO Connect Beta

Pulse | Feeds | Visualizers | Conversations | Connections

Sign in with **twitter** OR **Facebook** Login

waitingucks

trueblood

felipe

blood

mojo

caldaron

The Latest
WITHDRAWAL VICTIM

allimoral

*My Sunday night sucked without
#TrueBlood. #tbwithdrawal*

28 minutes ago Favorite | Retweet | Reply

TRUE BLOOD
JUNE 26 9PM
SUNDAYS

Ways To Feed Your Addiction

Video > Binge at HBO GO

Link > Reach out to your fellow Truebies

Check-In > Check (yourself) in with GetGlue

Link > Follow Baby Vamp's Blog

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GetGlue

getglue.com



GetGlue

getglue.com

GetGlue

Got HBO? Get Glue.

Check-in to each episode this season to unlock a set of 12 exclusive Boardwalk Empire "booze"-inspired stickers. Download the GetGlue app or visit GetGlue.com.



Social TV – Comcast’s Tuner Fish



- Comcast incubated Tuner Fish, as social search utility for TV
- HBO experimented with True Blood campaign

Ongoing shifts in digital media trends...



Mass Media

General

Passive

National

Wide Audience

Broadcast

Wired

Single Platform

At Home/Office

Editorial Control

Gross Rating Points

Household Targeting



Me Media

Personalized

Interactive

Local

Niche Segments

Unicast

Wireless

Multi-Platform

On the Go

Social / Wisdom of Crowds

Cost per Action

Data Analytics Overload





- Linear appointment viewing **VS.** on demand on my schedule
 - At home on my big screen **VS.** on the go on my phone
- Passive lean back experience **VS.** interactive engagement
 - Top quality programming **VS.** affordable economics
 - Rich storytelling **VS.** 'snackable' short-form media
- Personalization and curation **VS.** social and crowdsourced
 - Targeting and relevance **VS.** privacy and anonymity

Questions?