MIT Research Lab of Electronics

Digital Media in 2011

Presented by

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Introduction

- Jamyn Edis, VP Emerging Technology @ HBO
- Professor (New Media/Marketing) @ NYU Stern
- Previously strategy consultant, focused on media, technology and communications

- Academic background @ Cambridge University (BA/MA) and Harvard Business School (MBA)
- Find me @ about.me/jamynedis
- Twitter @jamyn

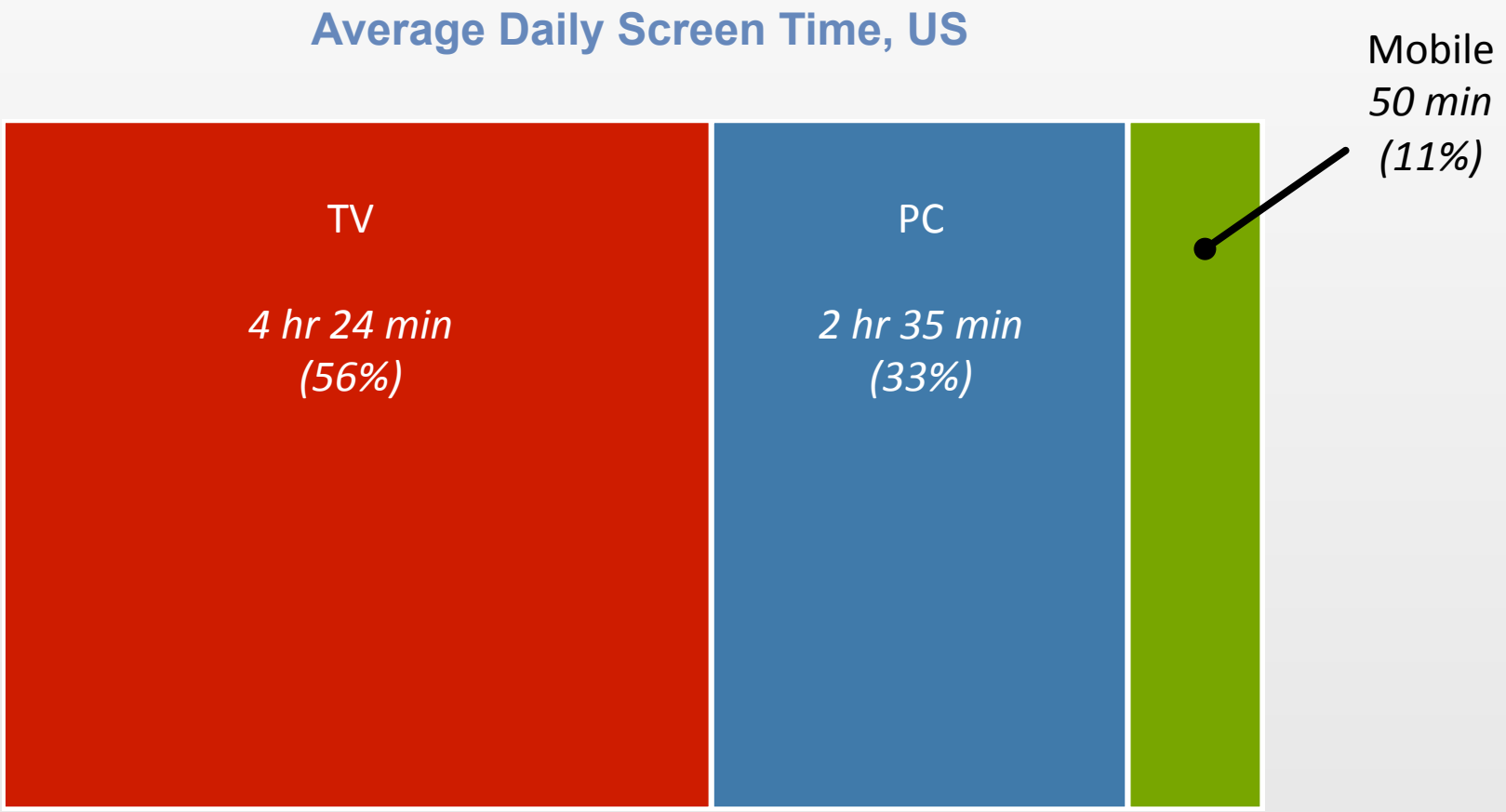
Today's Agenda

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

So, what's next for television?

Media consumption

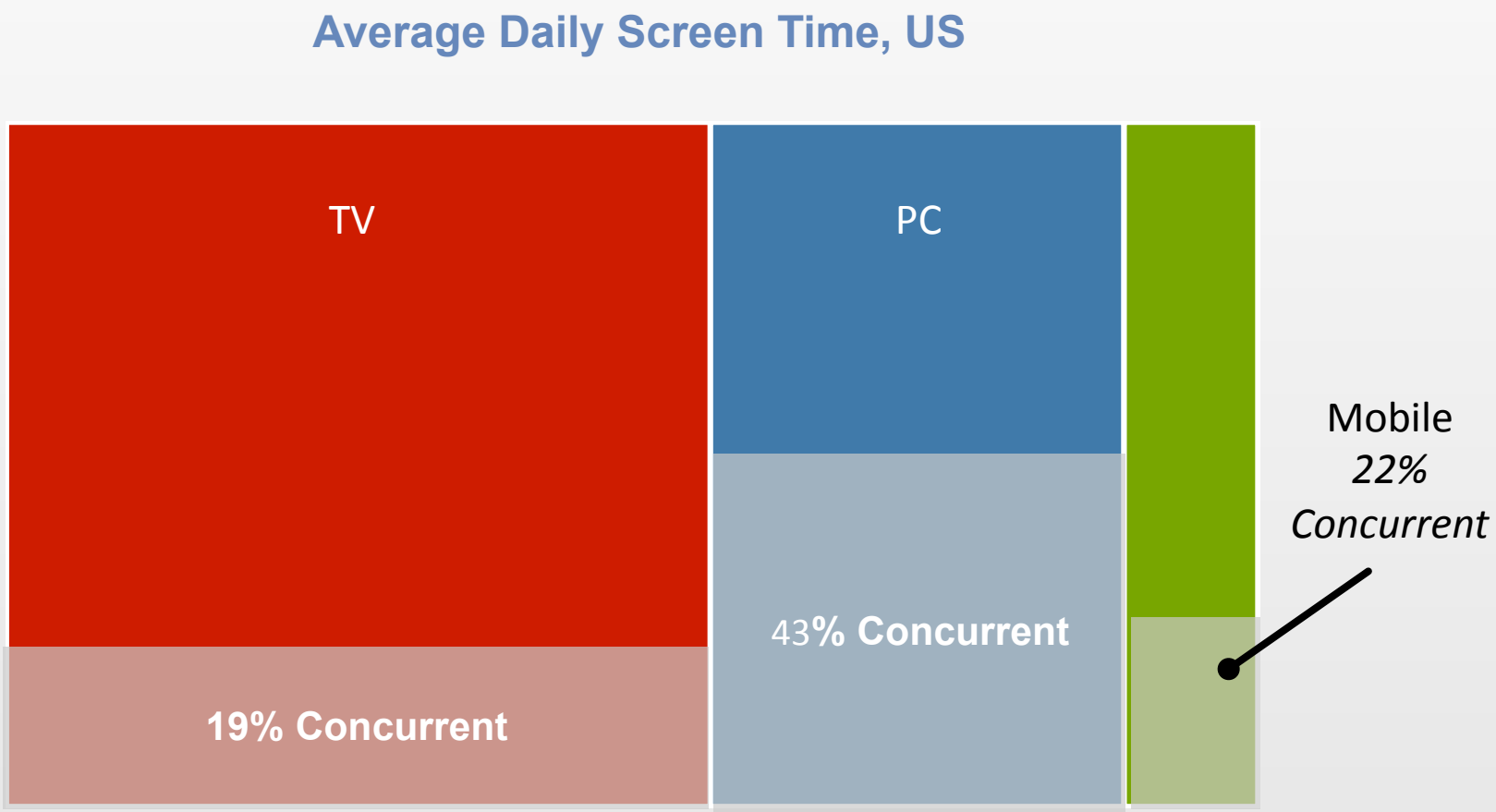
- People spend 8 hours a day in front of a screen



Source: eMarketer, Accenture analysis

Media consumption

- Concurrency puts the actual time closer to 6 hours



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

TV 2.0

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

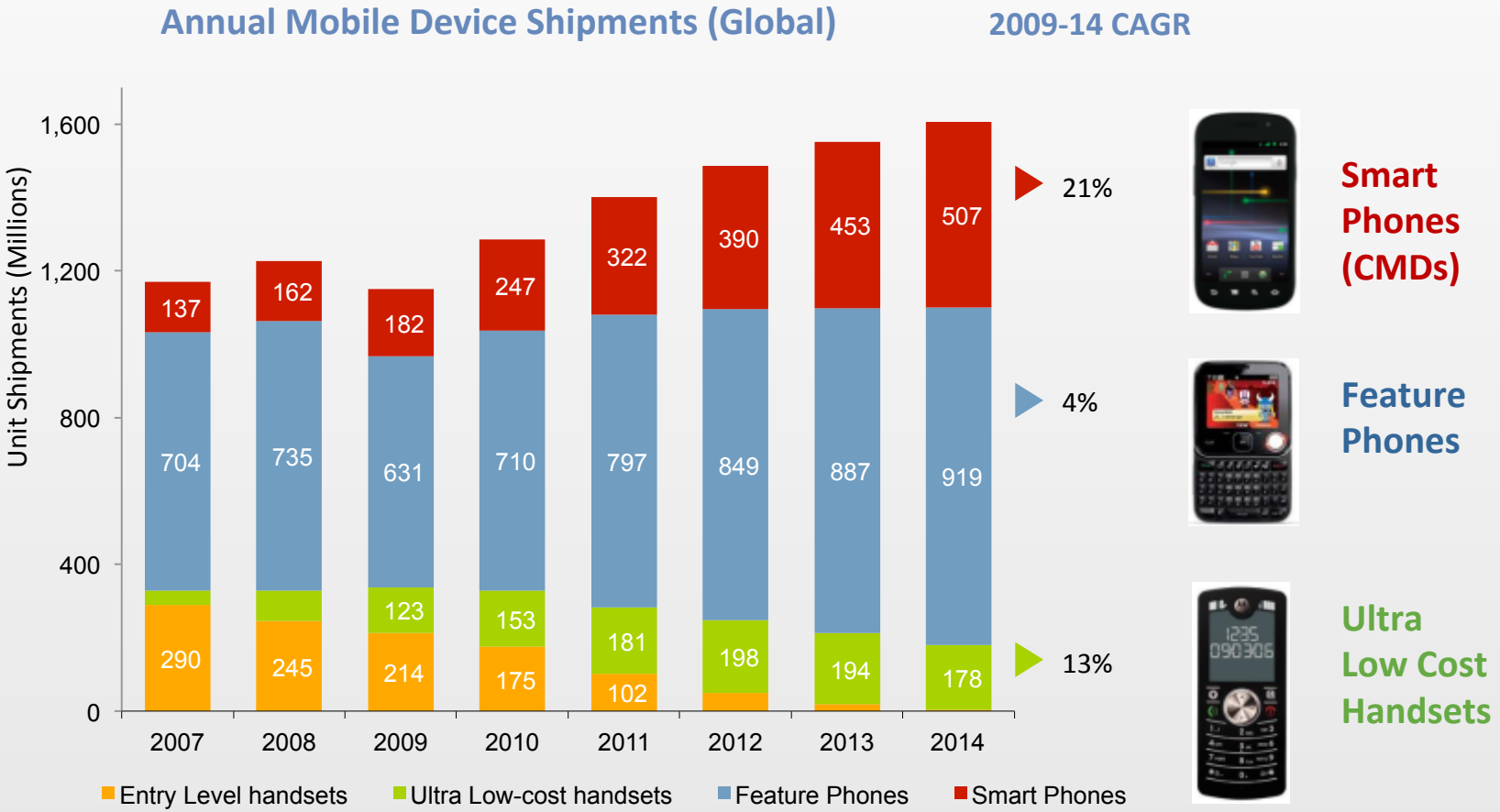
So, what's next for phones and mobile?

Now ‘mobile’ is more than just phones

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

Smart phones booming

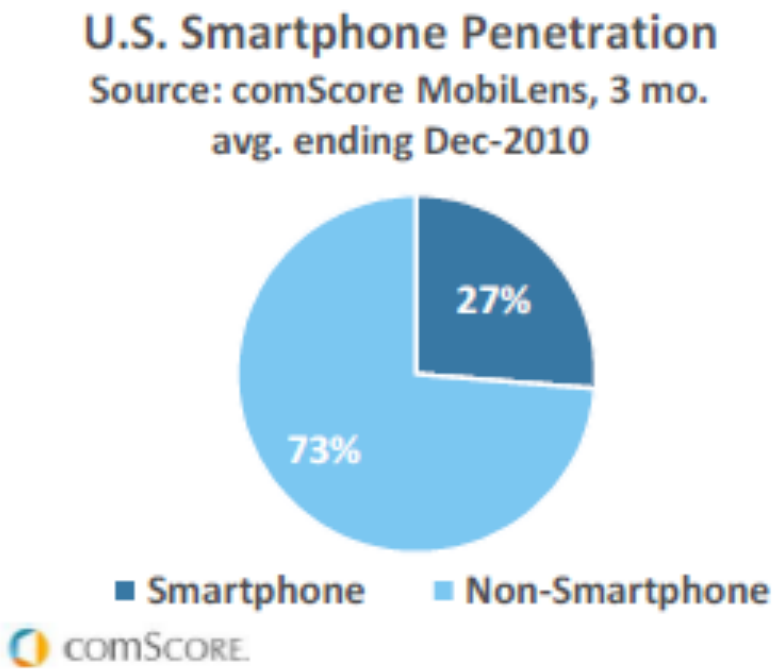
- Phones capable of mobile web and apps dominate

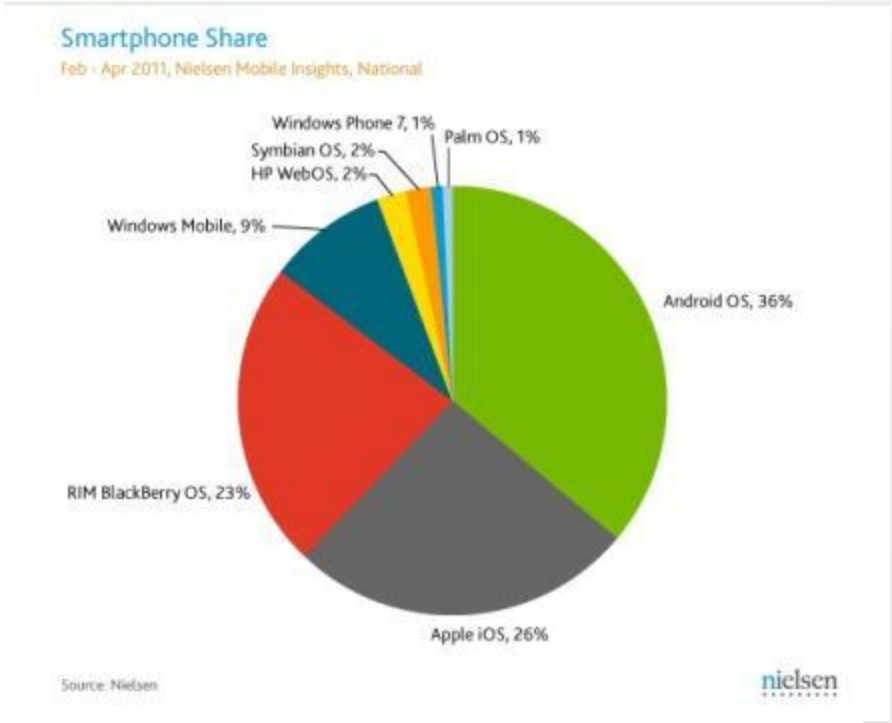


Sources: iSuppli, Accenture analysis

Smartphone and mobile OS share

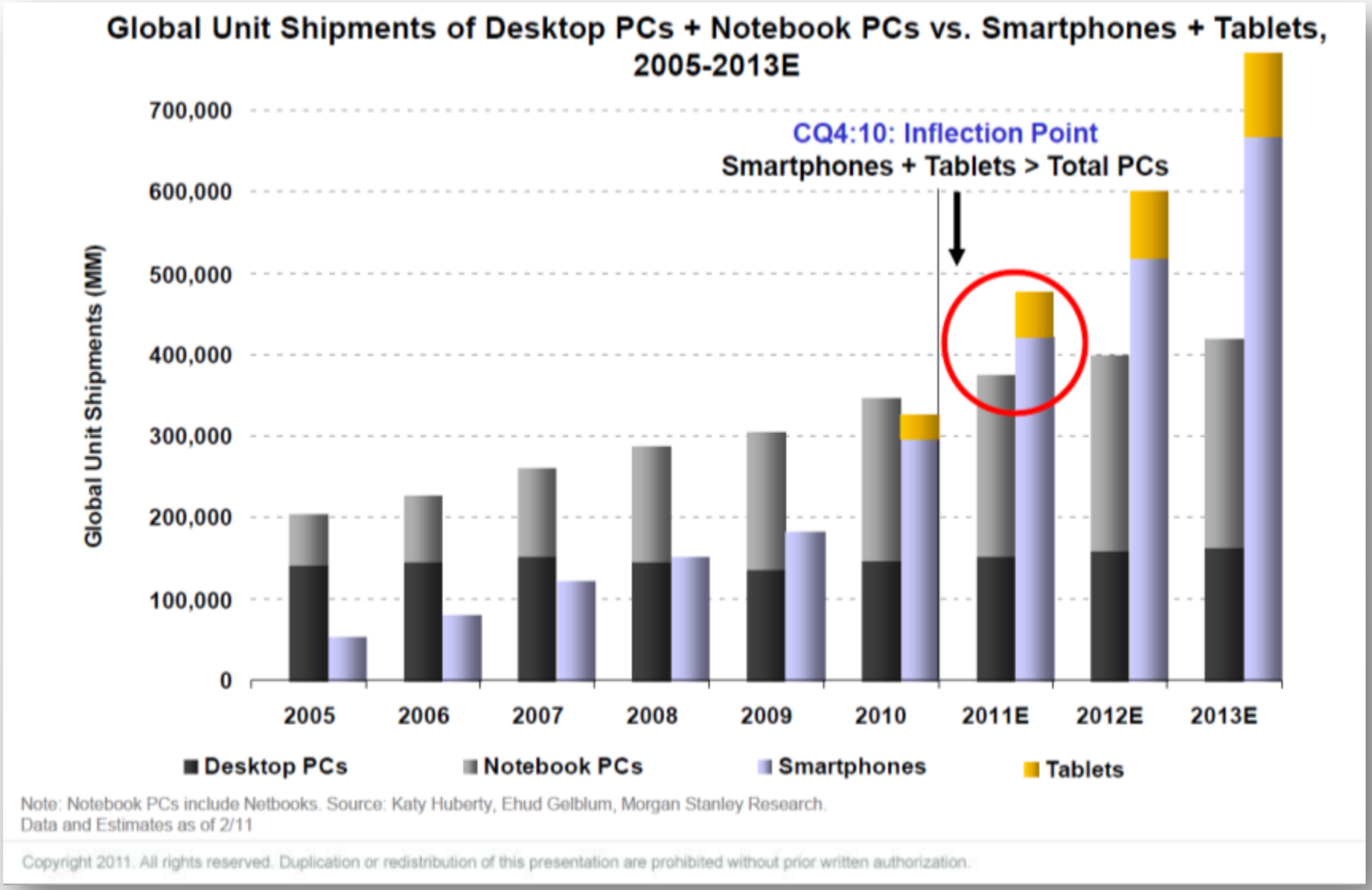
- Despite assertions, Apple does not rule the world





Generational shift in computing…

Smartphone + tablets > PCs



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The Big Apple

Steve Jobs' master plan revealed?

How are people getting content?

App attack

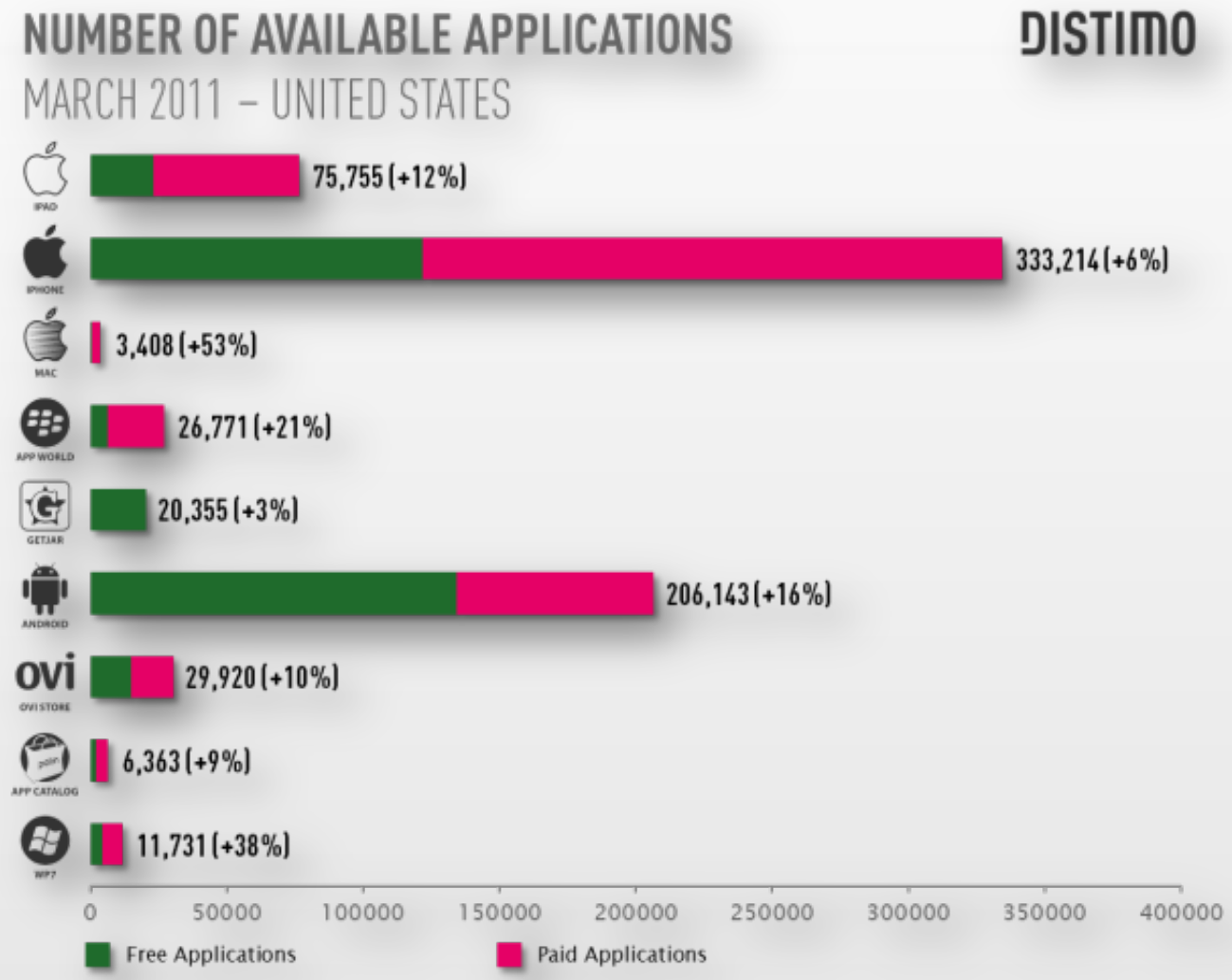
Thank you. Ten billion times.
The 10 Billion App Countdown promotion has ended.
Please come back to this page later to see who won.
epi

Software the new hardware: apps > devices

Historically		2011 and Beyond			
TV		Video			
Phone		Voice			
MP3 Player		Music			
Camera		Images			
Credit Card		Payments			

App store facts & figures

App store facts & figures



TV app stores

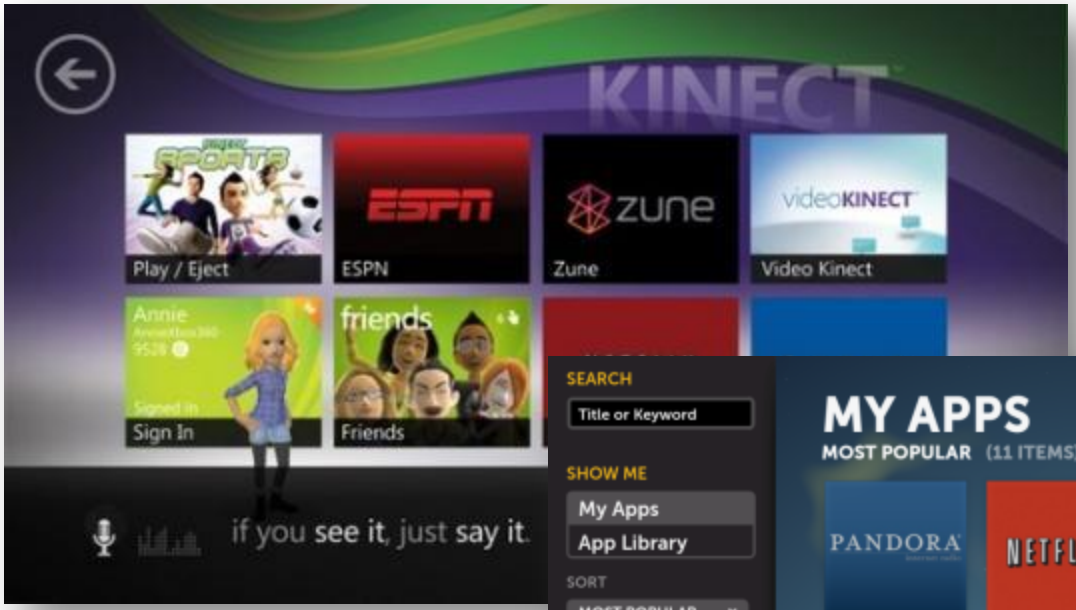
Samsung TV Apps

Vizio Internet Apps

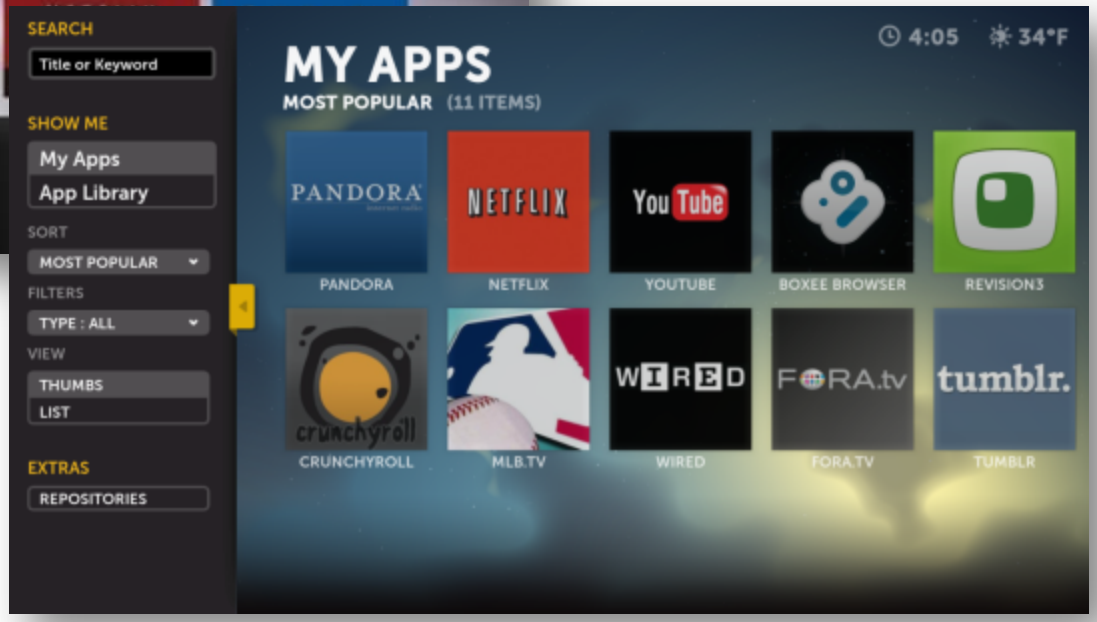
Google TV app store

Console and media hub app stores

X-Box 360 Apps



Boxee Apps



Web trends

What's new on the web?

Roll tape…

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

Search – beyond Google

Social

<< 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

Implications for the media industry…

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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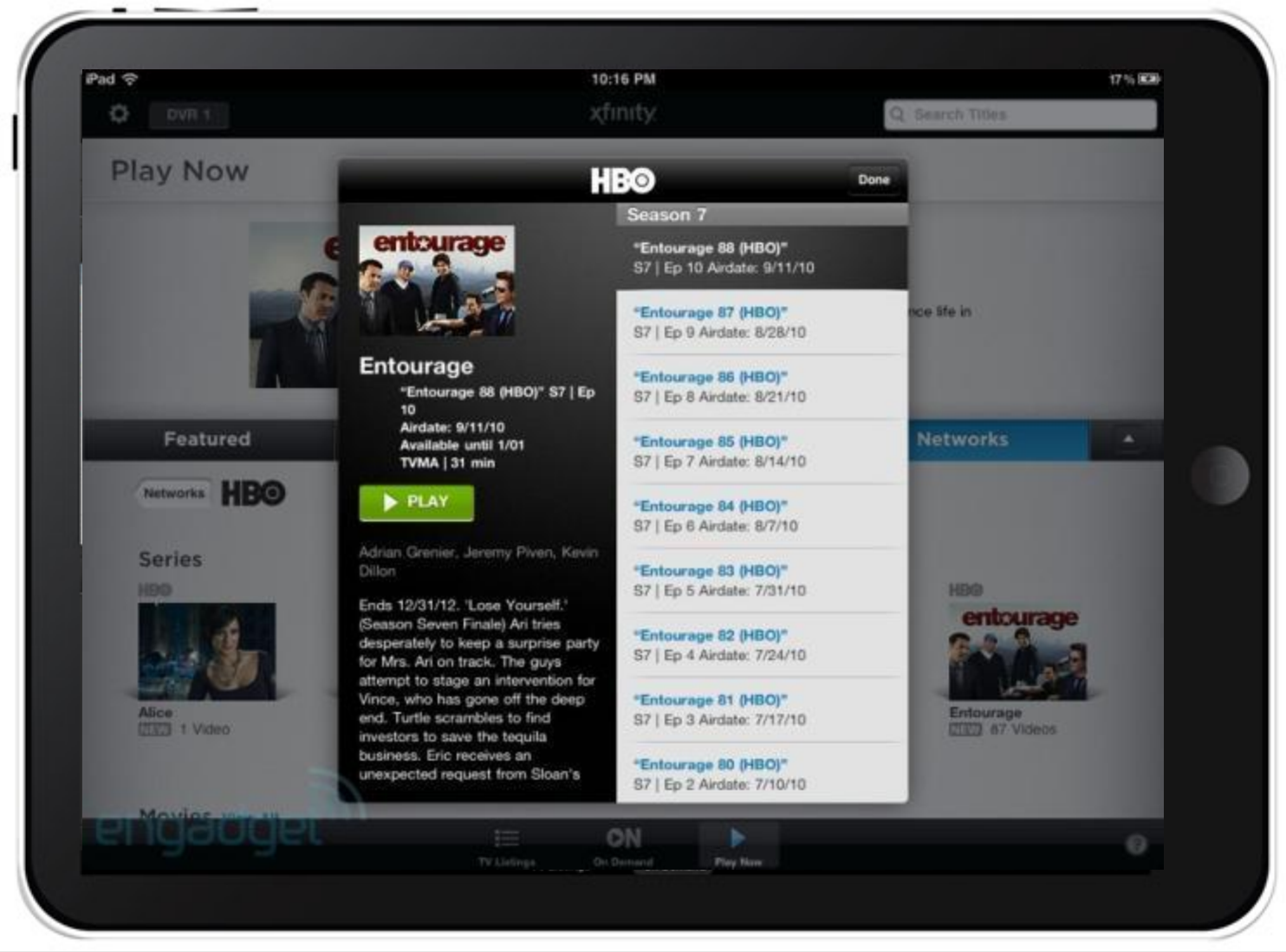
TV Everywhere – HBO GO

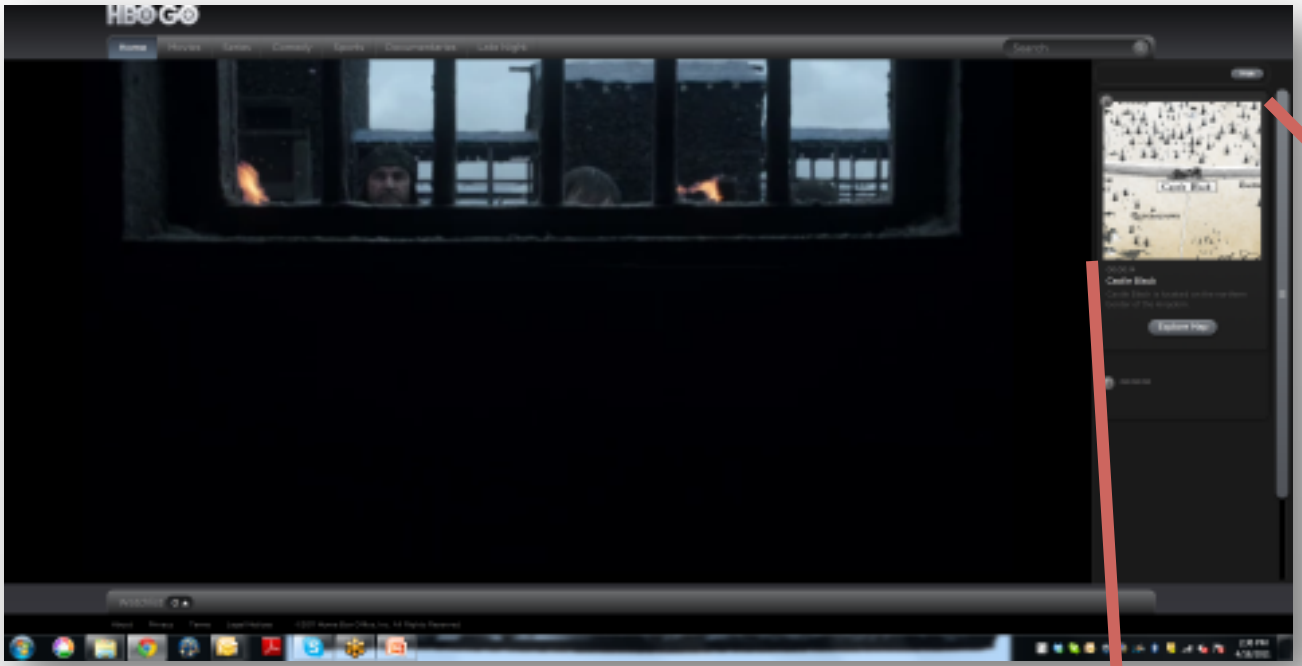
HBO GO goes mobile

- 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

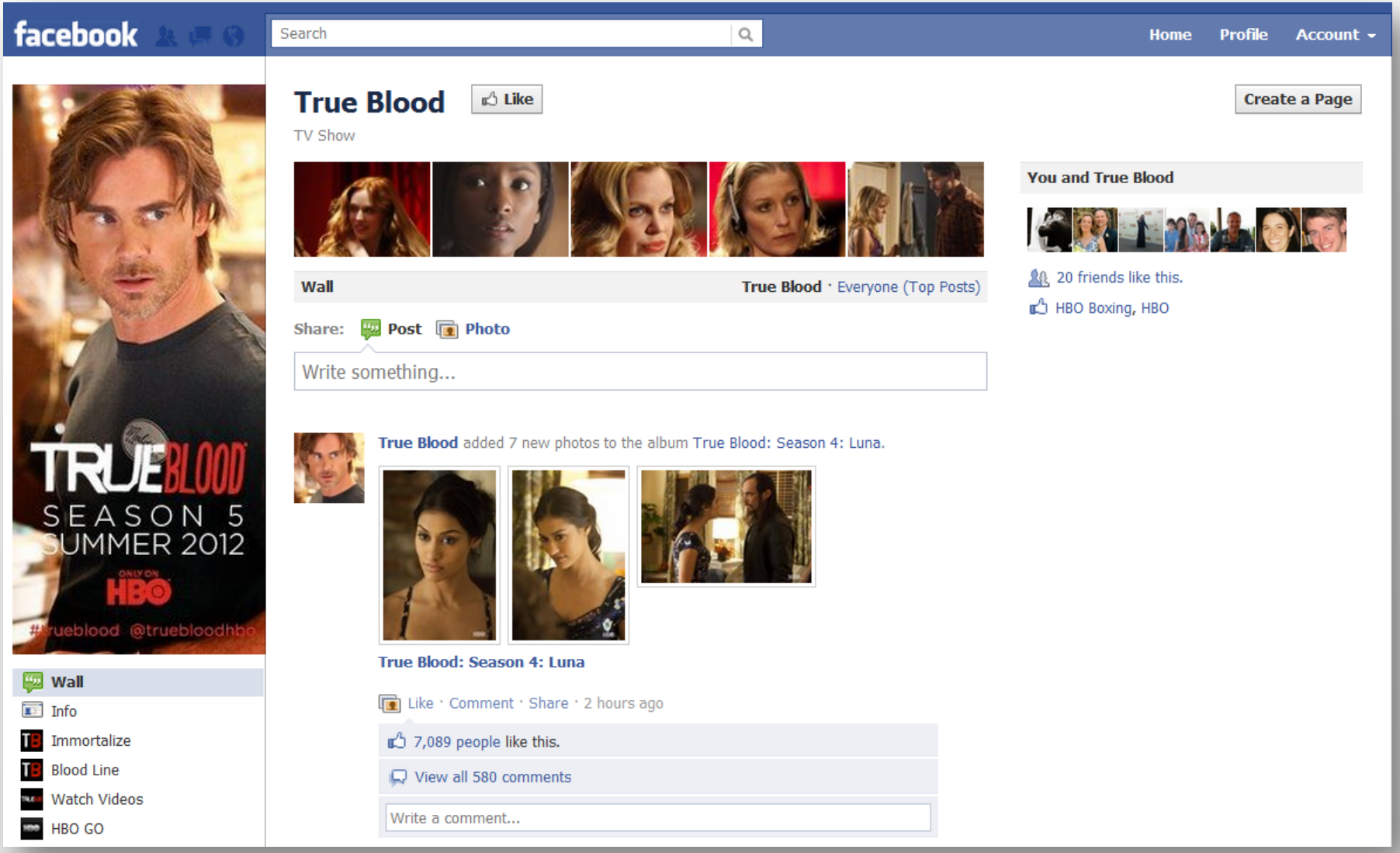


HBO GO extras – e.g. Game of Thrones

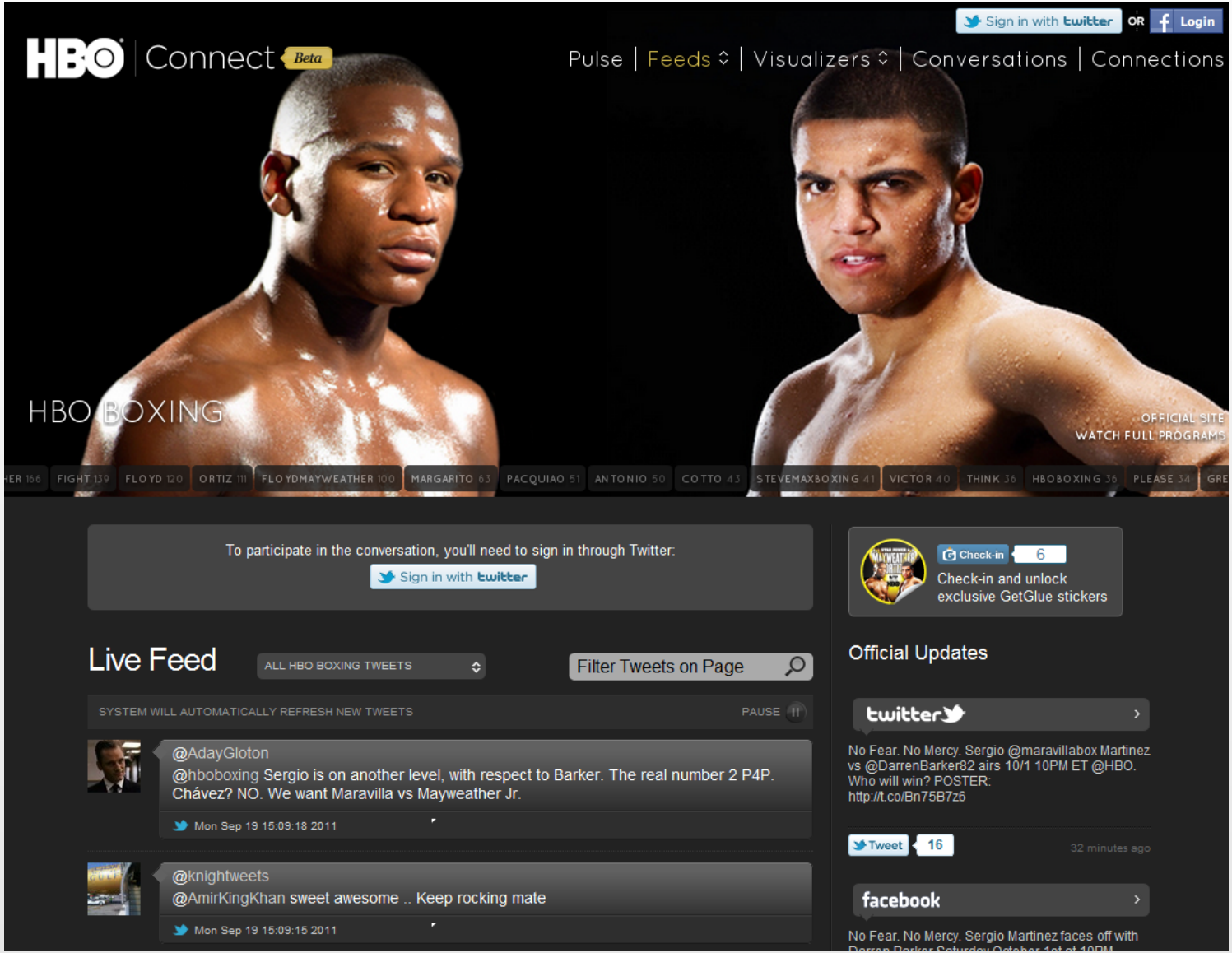


- Value added content (e.g. interactive maps) bound to real-time video playback on HBO GO

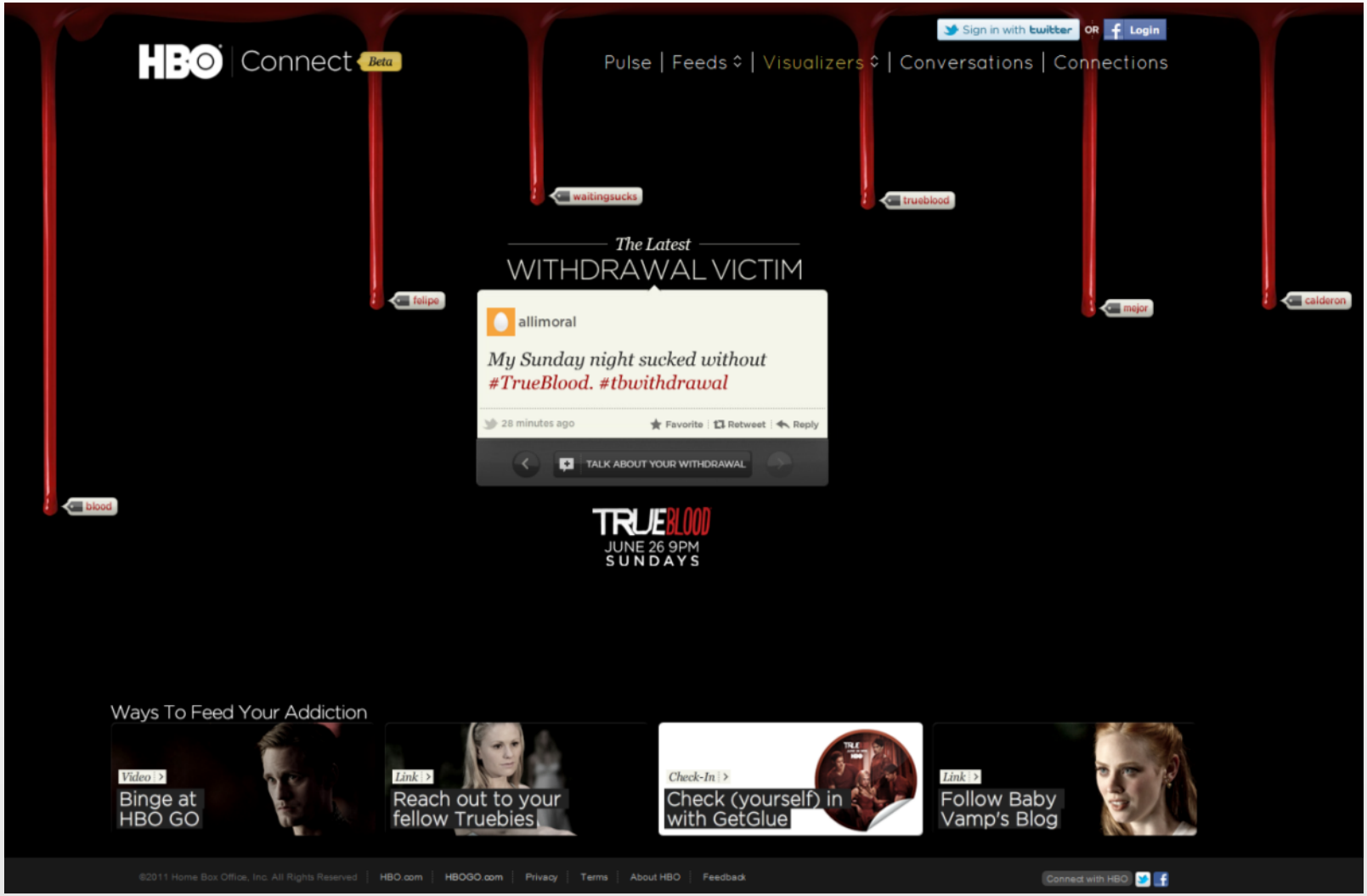
‘Traditional’ social media…



HBO Connect


Sign in with twitter
OR
Login
HBO Connect Beta
Pulse | Feeds | Visualizers | Conversations | Connections
HBO BOXING
OFFICIAL SITE
WATCH FULL PROGRAMS
FIGHT 139
FLOYD 120
ORTIZ 111
FLOYDMAYWEATHER 100
MARGARITO 63
PACQUIAO 51
ANTONIO 50
COTTO 43
STEVEMAXBOXING 41
VICTOR 40
THINK 36
HBOBOXING 36
PLEASE 34
To participate in the conversation, you'll need to sign in through Twitter:
Sign in with twitter
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
twitter
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
facebook
No Fear. No Mercy. Sergio Martinez faces off with

HBO Connect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Pulse | Feeds | Visualizers | Conversations | Connections
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trueblood
felipe
mejor
calderon
blood
The Latest
WITHDRAWAL VICTIM
allimoral
My Sunday night sucked without #TrueBlood. #tbwithdrawal
28 minutes ago
Favorite
Retweet
Reply
TALK ABOUT YOUR WITHDRAWAL
TRUEBLOOD
JUNE 26 9PM
SUNDAYS
Ways To Feed Your Addiction
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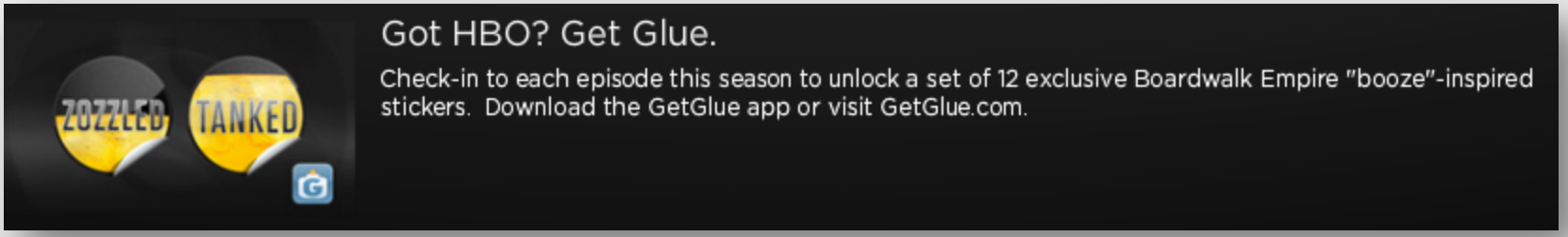

Social TV – Comcast's Tuner Fish

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

Ongoing shifts in digital media trends…

Mass Media		Me Media
General	→	Personalized
Passive	→	Interactive
National	→	Local
Wide Audience	→	Niche Segments
Broadcast	→	Unicast
Wired	→	Wireless
Single Platform	→	Multi-Platform
At Home/Office	→	On the Go
Editorial Control	→	Social / Wisdom of Crowds
Gross Rating Points	→	Cost per Action
Household Targeting	→	Data Analytics Overload

Satisfying the end user…

- 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?