The Future Viewing Landscape

A Decipher Presentation For TAM Ireland
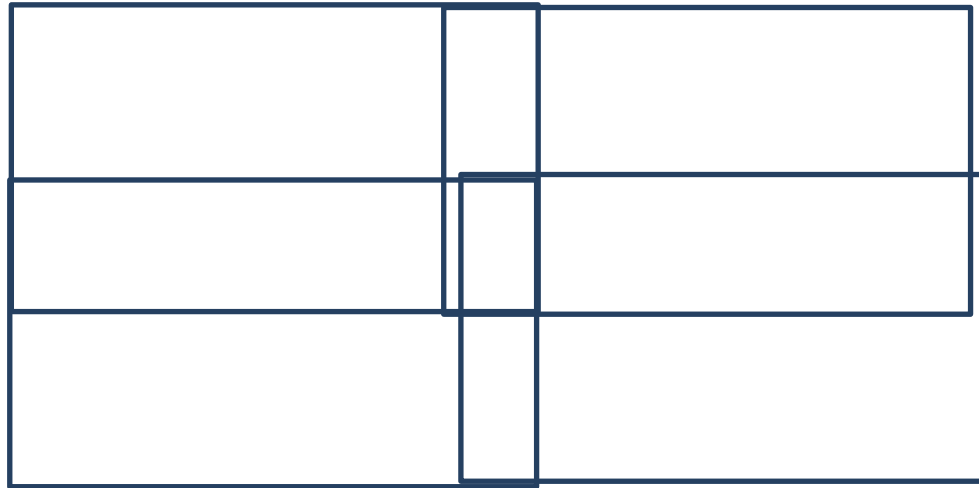
Dublin -   14th October 2016

decip her

@DecipherOffAir

"It's tough to make predictions, especially about the future"

- Yogi Berra

A Difficult Question

The Five Stages Of Television

Simple TV   **Multi-Channel**   **Multi-Function**

The Five Stages Of Television

Simple TV   **Multi-Channel**   **Multi-Function**   **Connected & Converged**   **Cloud**

The Five Stages – the competitors?

Simple TV	Multi-Channel	Multi-Function	Connected & Converged	Cloud

Simple TV	Multi-Channel	Multi-Function	Connected & Converged	Cloud
Broadcasters	Broadcasters	Broadcasters	Broadcasters	??
Phone Co.s	Platforms	Phone Internet TV Platforms	New Aggregators	
	Phone Co.s		QuadPlay	
	Internet		Smart	
	Mobile	Mobile		

The Five Stages – what do we measure?

Simple TV

- Colour Broadcast
- Remote Controls

Multi-Channel

- FTA Broadcast
- Pay Broadcast
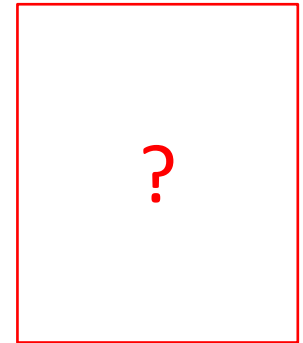- Red Button / MHEG
- PC Catch Up

Multi-Function

- FTA Broadcast
- Pay Broadcast
- PVRs
- Catch Up x 2
- Box Set/ Movie VOD x2
- Clips / Short Form (Device)
- Social Media (Device)

'Connected' & 'Converged'

- 4k Broadcast / linear IP
- Red Button 2 / IP
- Rich Media EPGs
- nPVRs
- OTT On-Demand
- Clips /Short Form (TV)
- Social Data/Web Apps (TV)

Cloud

?

What Should Broadcasters Care About In 2016/17

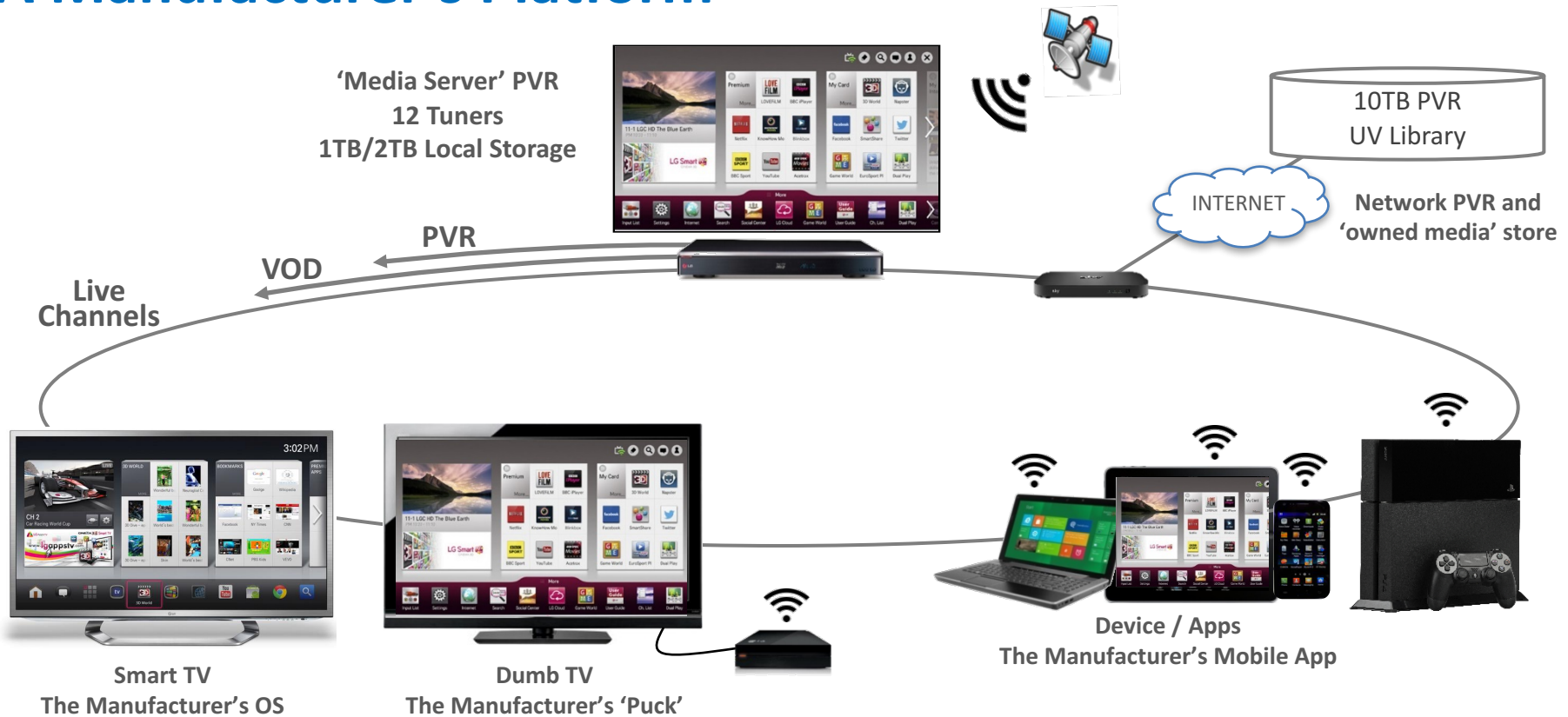| Stronger, More Pervasive Platforms	The Rise of 'Presentation	The Rise of Search & Recommendation	Greater Integration Between Linear and VOD	Greater Integration Between Web & TV	The Impact of Data

More Pervasive Platforms

'Media Server' PVR
12 Tuners
1TB/2TB Local Storage

10TB PVR
UV Library

INTERNET

Network PVR and
'owned media' store

PVR

VOD

Live
Channels

Smart TV
The Operator's Platform App

Dumb TV
The Operator's 'Puck'

2 concurrently

Device / Apps
The Operator's Mobile App

2 concurrently
Limited OOH capability

A Manufacturer's Platform

'Media Server' PVR
12 Tuners
1TB/2TB Local Storage

10TB PVR
UV Library

INTERNET

Network PVR and
'owned media' store

PVR

VOD

Live
Channels

Smart TV
The Manufacturer's OS

Dumb TV
The Manufacturer's 'Puck'

Device / Apps
The Manufacturer's Mobile App

@nwalley

@DecipherOffAir

"Challenger" Platforms

Apple TV

iOS
iTunes

No broadcast

Amazon Fire TV

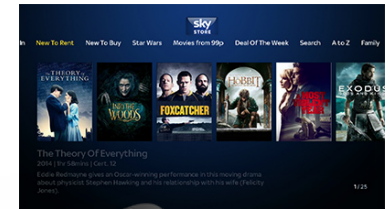*Fire OS (Android)*
Amazon

No broadcast
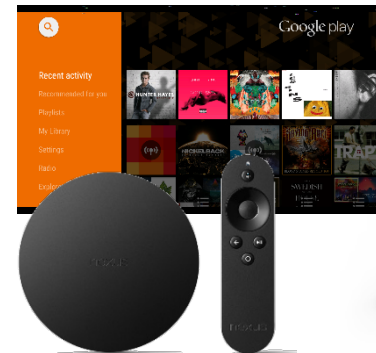
Google Nexus

Android
Google Play Movies

No broadcast

Now TV

Roku OS
Various retail options

New TV Smart Box has broadcast

Rise of Presentation - Rich Media EPGs

Simple TV
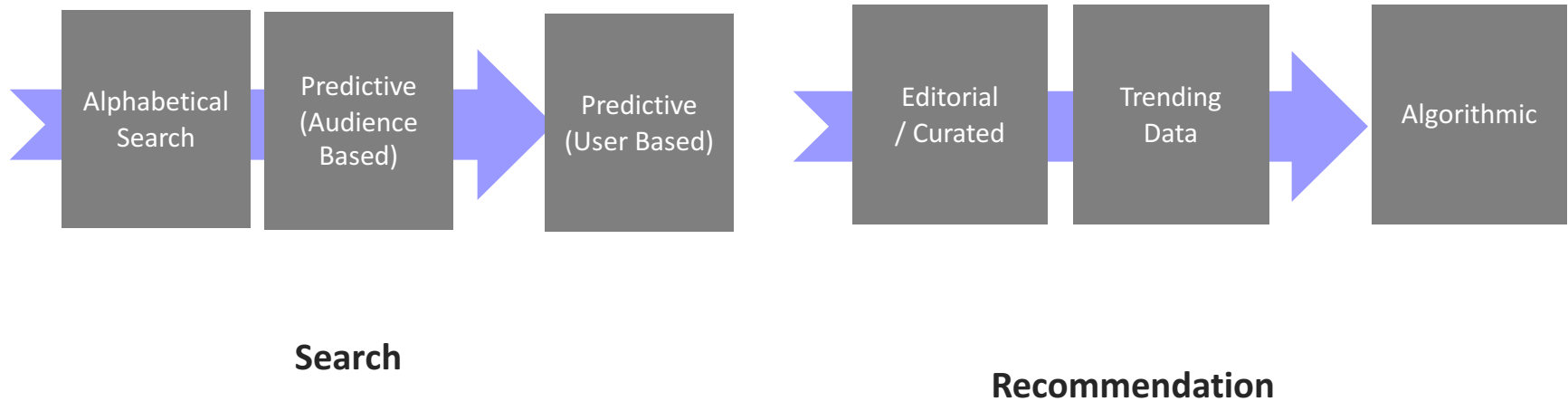
Multi-Channel

Multi-Function

'Connected' & 'Converged'

Rich Graphics (Netflix)
Movement (XboxOne)

Cloud

Rich Metadata

Evolution of Search & Recommendation

Alphabetical Search → Predictive (Audience Based) → Predictive (User Based)

Search

Editorial / Curated → Trending Data → Algorithmic

Recommendation

Evolution of Search & Recommendation

'The Rise of The Algorithm'

'Rich metadata'
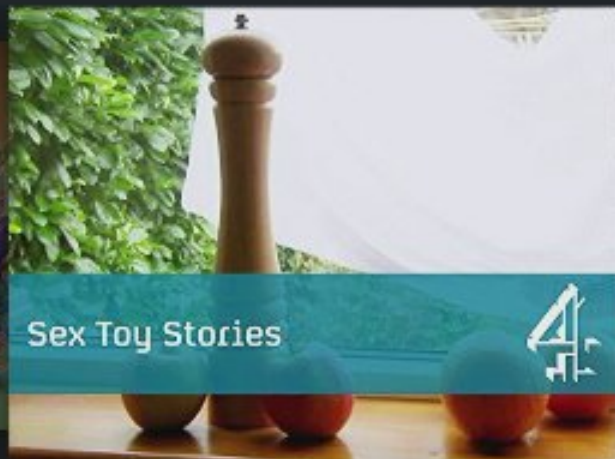
ABC Text Search

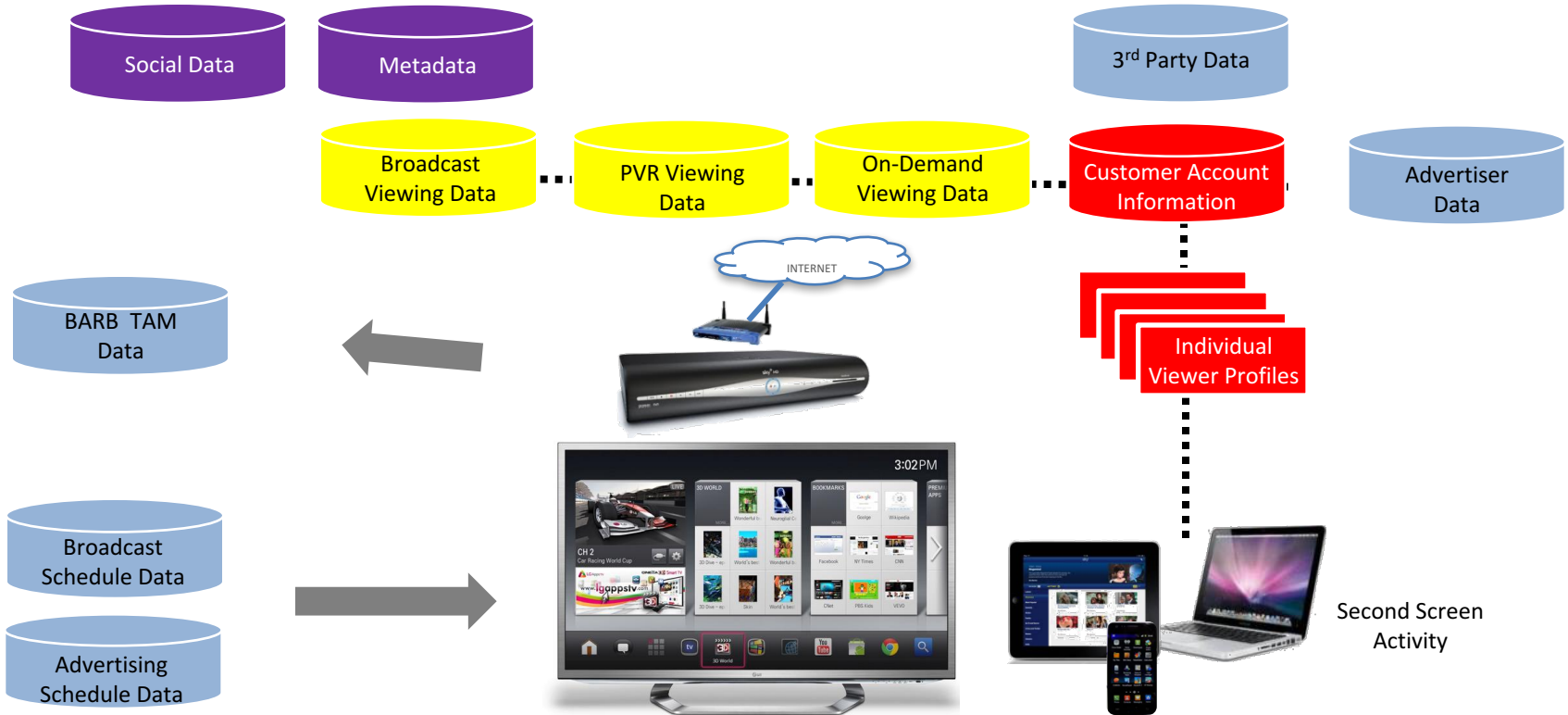🎤 Voice Search   Toy Story

Listening…

"Toy Story"

Movies & TV 37   Apps & Games 2

★★★★★ (1)

Sex Toy Stories Eight ordinary women join forces with Ann Summers to create a new sex toy

Convergence of TV and the Web – Platform Data

Social Data

Metadata

3rd Party Data

Broadcast Viewing Data

PVR Viewing Data

On-Demand Viewing Data

Customer Account Information

Advertiser Data

INTERNET

BARB TAM Data

Individual Viewer Profiles

Broadcast Schedule Data

3:02PM

CH 2
Car Racing World Cup
3D World

Advertising Schedule Data

Second Screen Activity

"*I visualize a time when we will be to robots what dogs are to humans, and I'm rooting for the machines*"

- Claude Shannon