Pulse of Media: Navigating the Complexity of an Evolving Digital World

**THEME 1**
**The Golden Age of Video Consumption**

*How is the consumer relationship with media evolving?*

Video consumption—any time, anywhere—has become mainstream, accelerating the decline of traditional TV viewing. As consumers consume more content, quality matters. Consumers are both kings and kingmakers, controlling which bundles, brands and content succeed.

**NOW**
- Short form video is upping the game.
- Consumers expect HD for live linear and VOD.
- Content shifts away from reality TV.
- Higher ratings for cable with original programs.
- OTT services are earning awards.
- Original content is driving OTT subscriber growth.
- Optimized OTT content libraries at low prices balancing quality and quantity.
- Greater success of professional content versus amateur.

**IN PLAY**
- OTT services are earning awards. Original content is driving OTT subscriber growth.
- Optimized OTT content libraries at low prices balancing quality and quantity.
- Greater success of professional content versus amateur.
- Gigabit internet delivers high fidelity of interactive consumption.
- New delivery methods: LTE broadcast, Wi-Fi mesh networks and p-cell technology.

**EMERGING**
- Live linear viewing out-of-home.
- Geographic boundaries are breaking down.
- Delivery of 4K content.
- Inclusion of OTT services in MVPD packages.
- New operating models: web-approach to Pay TV with cloud-based functionality.
- Consolidation of the value chain.
- New content bundles—what is the optimal mix?

**THEME 2**
**A New Media Paradigm**

*What are the underlying drivers in the industry?*

The democratization of content creation, the need to evolve content delivery, and the mandate to evolve content business models will require traditional content providers to transform into digital product distribution companies.

**NOW**
- Broadcast Availability with Broadband Flexibility; content delivery must be device agnostic.
- Reaching the Digital Generation; media companies must be "tech forward", evolving the media value chain.
- Foundational infrastructure with greater agility, capacity, efficiency and sustainability.
- OTT infrastructure delivering SD and HD on pipes with at least 2 Mbps.

**IN PLAY**
- Alternative financing options with crowd-funding.
- Greater creative freedom via greater rights, more opportunities.
- Distribution network shifts to best content for each device.
- Consumer streaming services to address cord nevers/shavers.
- New operating models: web-approach to Pay TV with cloud-based functionality.
- Consolidation of the value chain.
- New content bundles—what is the optimal mix?

**EMERGING**
- Augmented experiences and holograms for new content.
- Gigabit internet delivers high fidelity of interactive consumption.
- New delivery methods: LTE broadcast, Wi-Fi mesh networks and p-cell technology.
- Personalization at scale: consumer data enriched by new devices/services.
- Measurement across all screens. Differentiation with context: measuring interactions of multiple media.

**THEME 3**
**Shift from Protection to Innovation**

*What is the competitive environment?*

Disruptors are shaking up the competitive landscape and media companies are challenged to innovate, evolve video services, expand capabilities and experiment with new monetization models.

**NOW**
- Service Differentiation with Digital Obsession; media companies seek new content, context and bundling.
- Evolution of the tech media challengers.
- Evolving economics: subsidization of media; business models based on technology to manage margins.

**IN PLAY**
- TV everywhere: live linear on any screen.
- Personal streaming services to address cord nevers/shavers.
- Incorporation of OTT services on MVPD set-top-boxes.
- Delivery of 4K content with expanded wired and satellite infrastructure.

**EMERGING**
- Increased engagement and monetization methods by matching context of content/media.
- OTT stand alone services.
- End of media company vertical integration.
- Traditional studios seek to reach new consumers through acquisition.
- Telco 2.0: all-IP, modular, interoperable and layered.

**Re-Imagined Monetization**
- from advertising to bundled content—what is the optimal mix?
- Investment in future infrastructure. New entrants shake it up.
- Double and triple plays with broadband services as a provider criteria.