

Content Distribution and its major challenges

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Internet Generation

Digital Society

People

Data

Connectivity

90's
&
00's

Capacity
100+ Exabytes*
70% is video

Entertainment
1.8b+ TV's
Connected**

Devices
30b+ Devices***
"Internet of Things"

10's

Digital Industry Evolution



Industry Wars



Entertainment



Communication



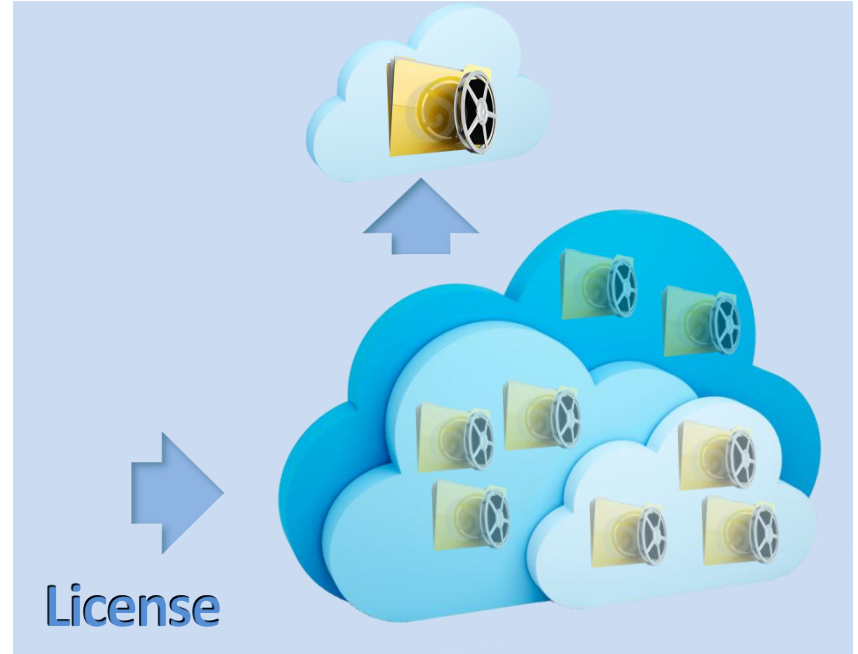
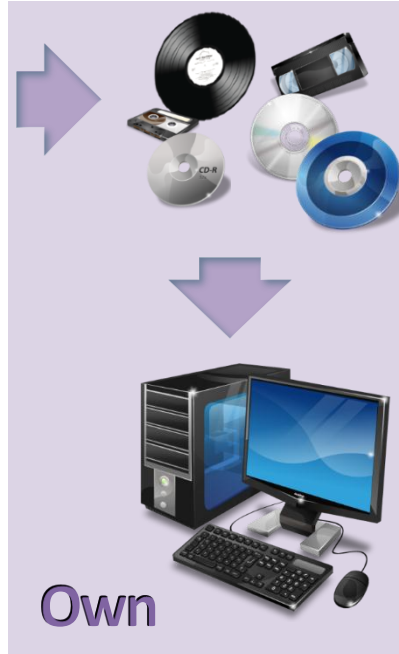
Computing



Front Lines

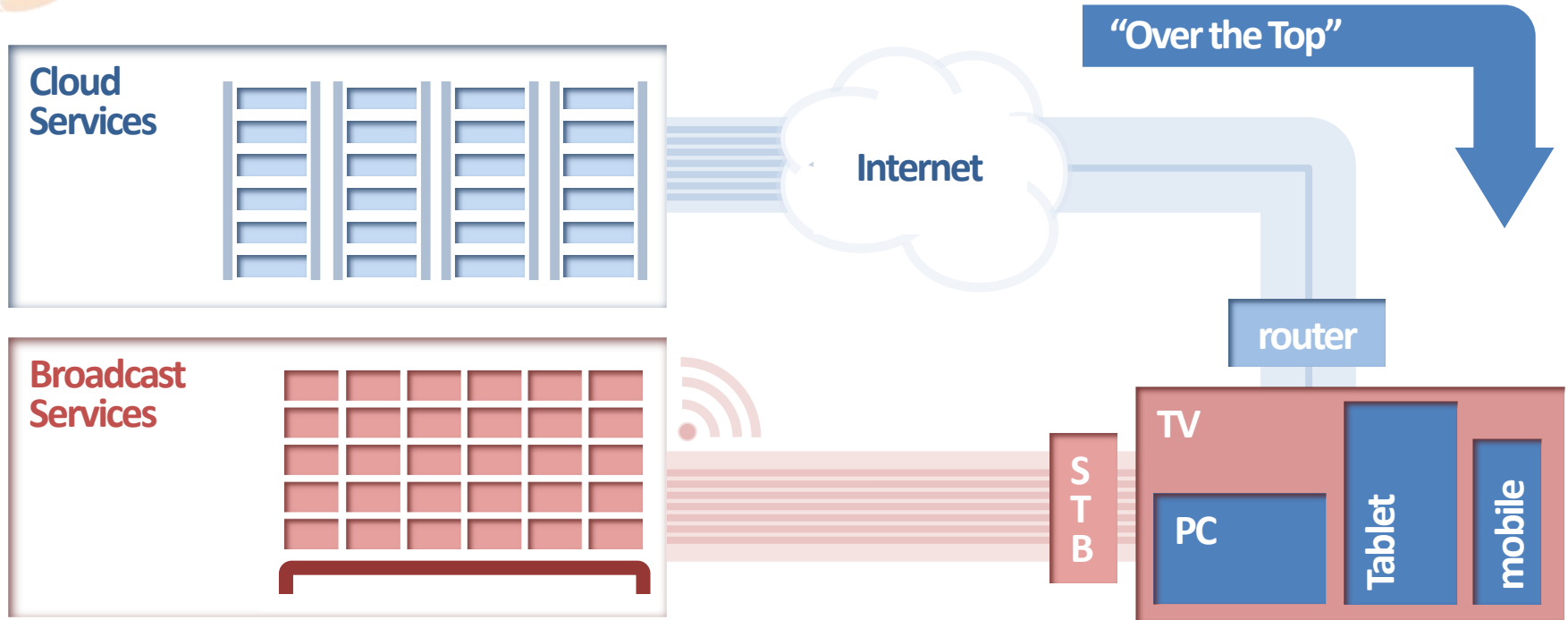
- Subscriber Ownership
- Industry Relevance
- Revenue Protection

Evolving Consumption of Entertainment





Broadcast Over the Top





Channel Hopping ⇨ Search & Discover



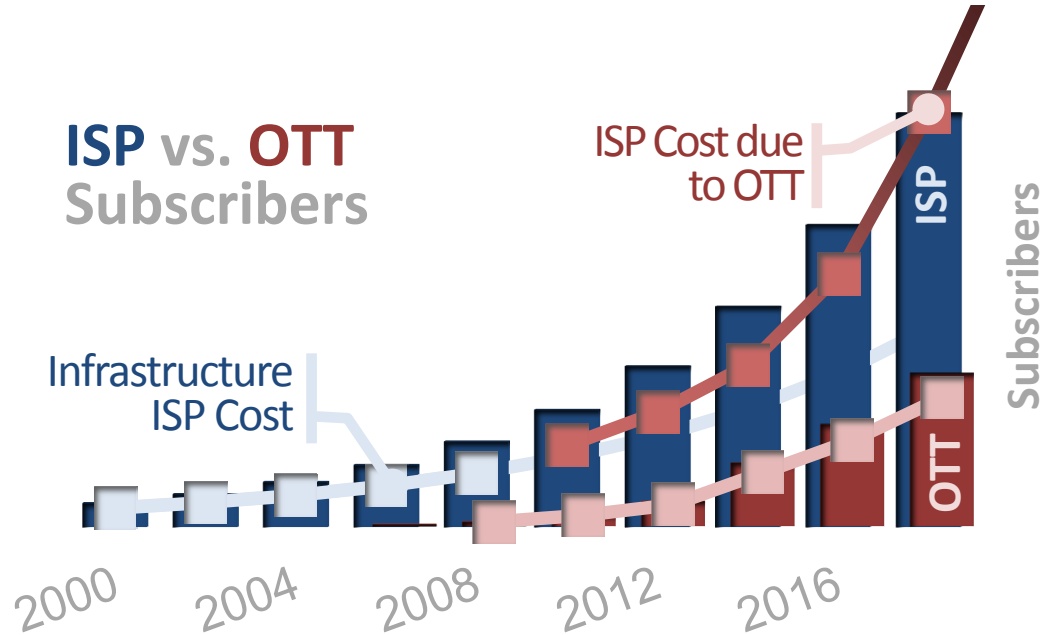


Networking

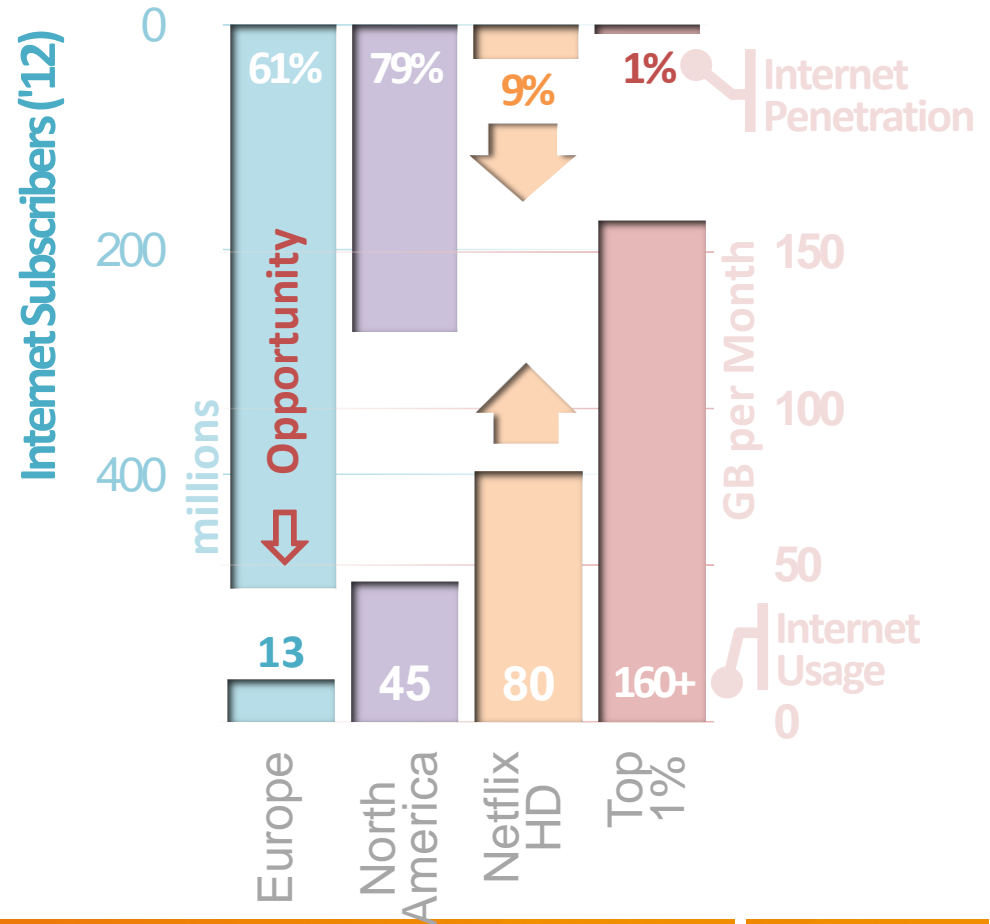


Entertainment

ISP vs. OTT Subscribers



As sales in OTT increase, ISPs have the burden to invest in bandwidth to keep up with demand

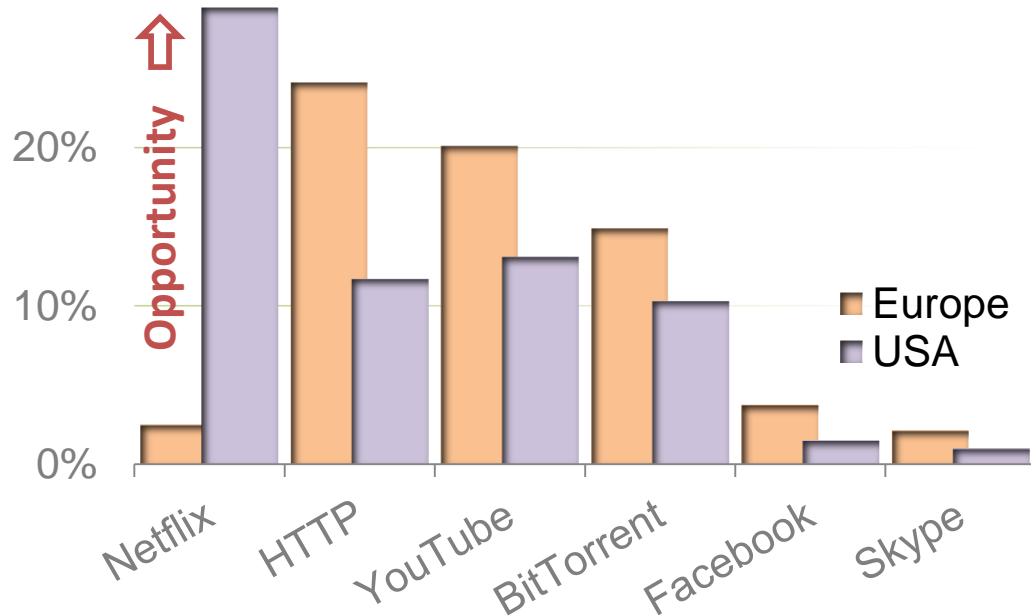




Internet Usage - USA vs. Europe

Without OTT Europe Uses...

- Web streaming
- YouTube
- P2P Sharing





Net Neutrality

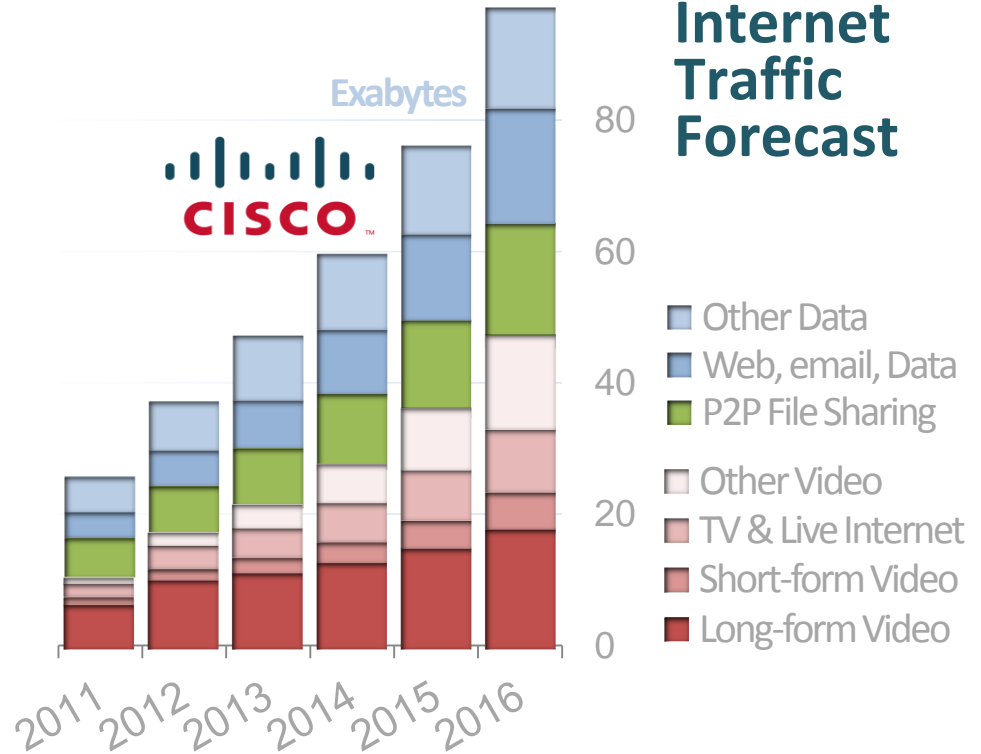


Internet Governance

*Internet Governance:
Data Discrimination, Traffic
Shaping, Bandwidth Caps,
Blocking & Filtering,
Premium Rates, etc.*

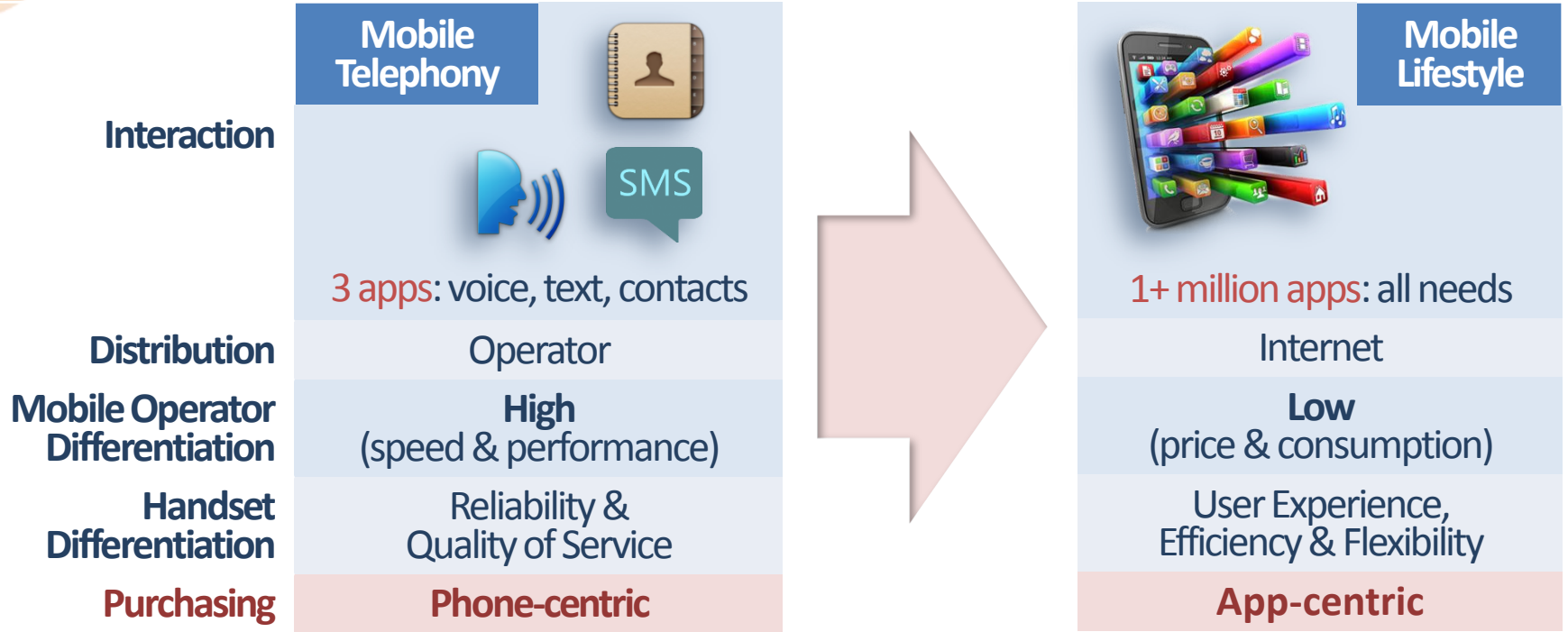
**Video will be ≈70%
of Global Traffic by 2016**

- ≈11.0 billion HD movies*



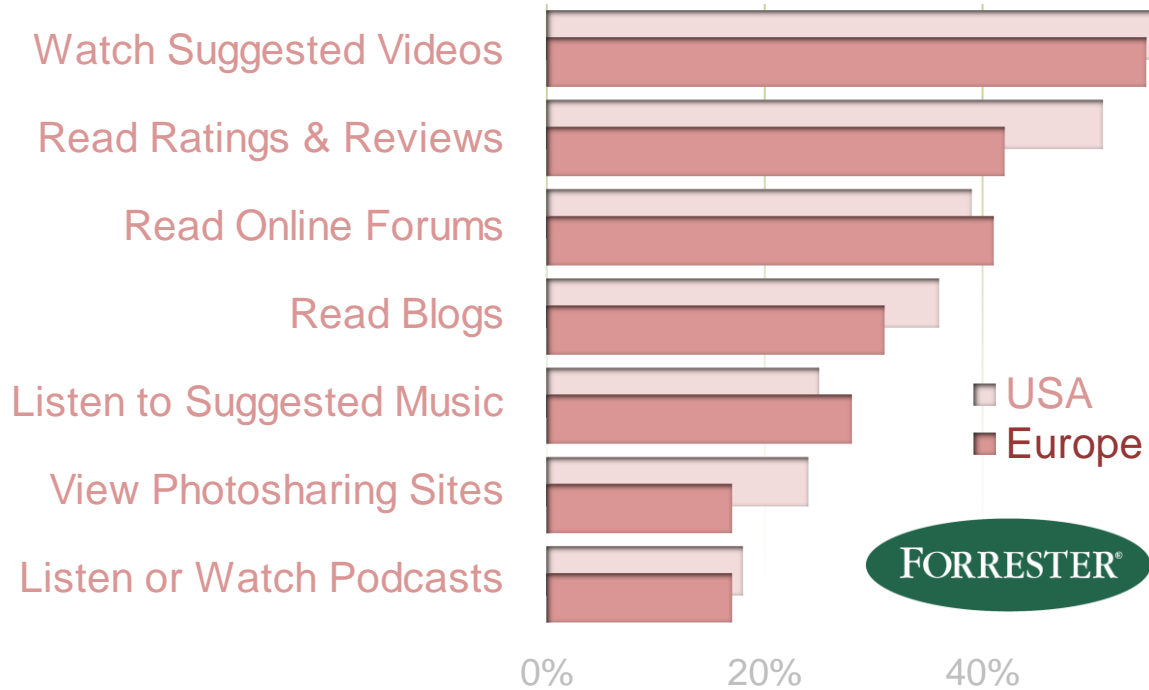


Mobility Apps



Social Influence on Consumption

How Subscribers Consume Internet Content

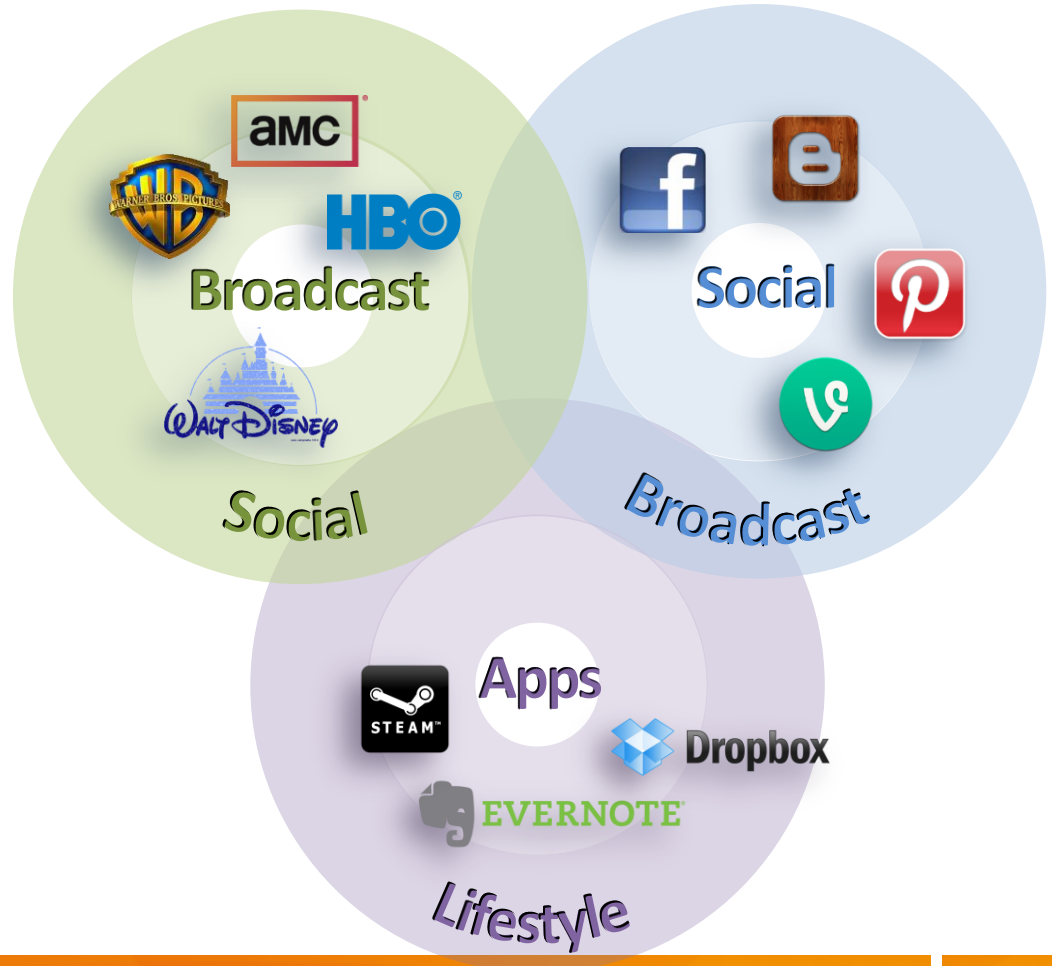




Broadcast Centric



Social Centric





Entertainment



Communication



Computing



OTT Binds All Three Industries

OTT Evolution - Content Discovery



*A Recommendation Engine is not just about Content Suggestions
It's about a Meaningful & Personal Engagement*

OTT Evolution – More Than Video

*OTT will bring
the future of
Entertainment
to tomorrow's
Digital Society*



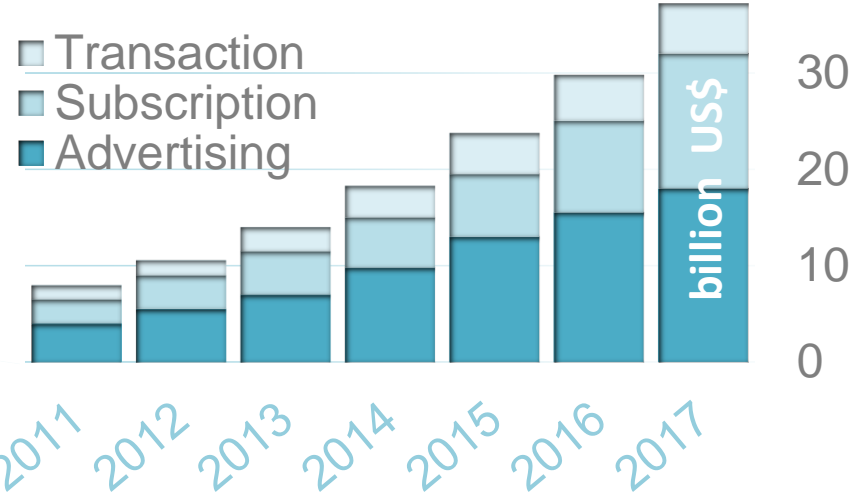
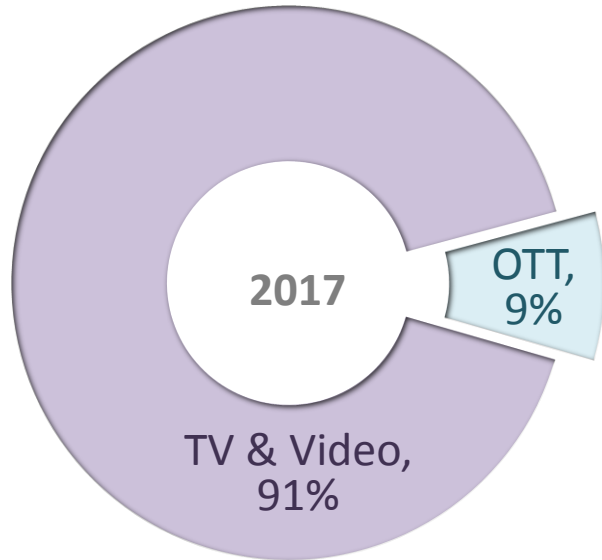


Market - Broadcast & OTT

TV & Video market estimated at \$395b globally, by 2017

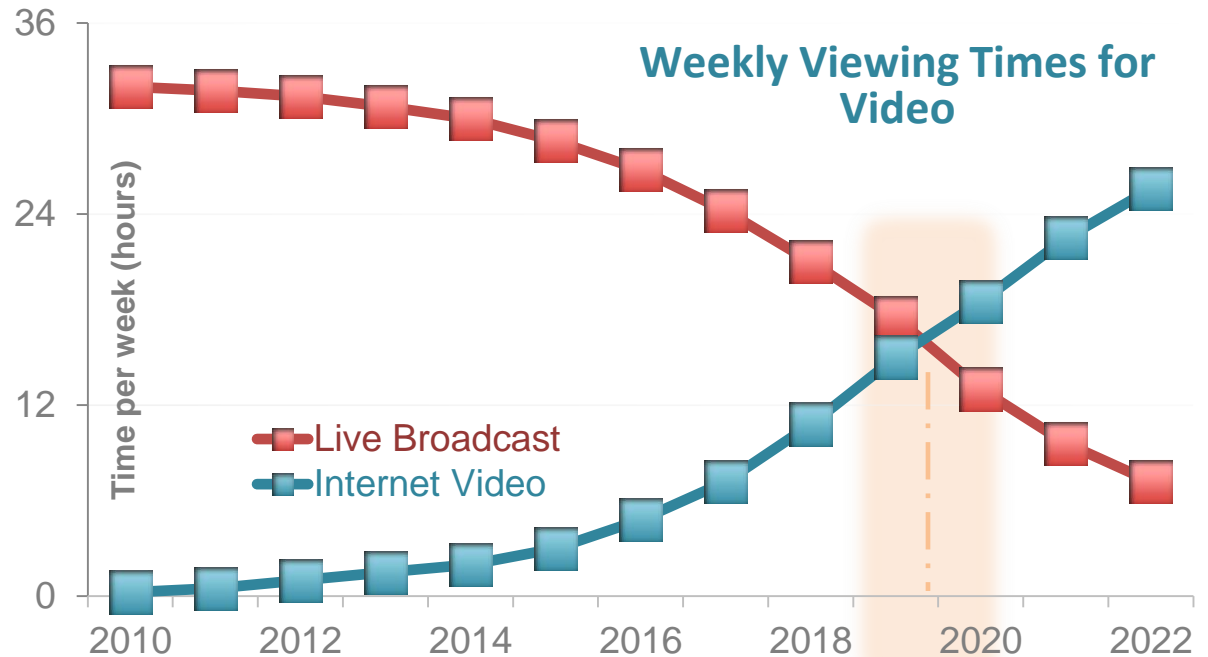
OTT - 37b US\$ by 2017

Global OTT Forecast '11-'17



Online will Surpass Broadcast

By the end of this decade, more people will be watching Internet video than television

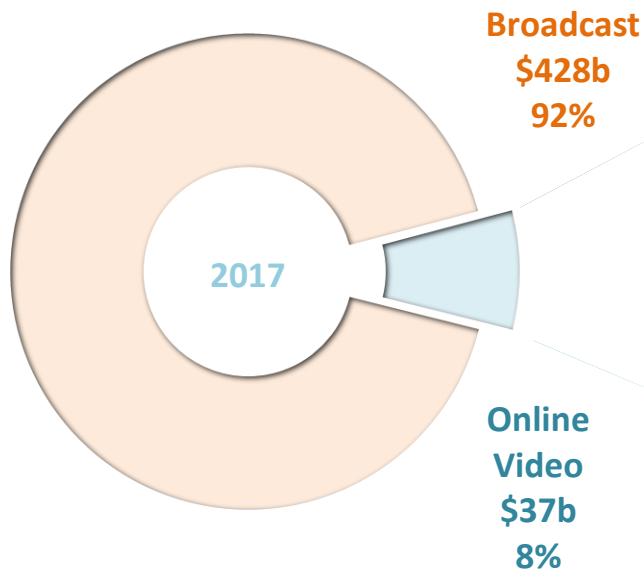


Market - Broadcast & OTT

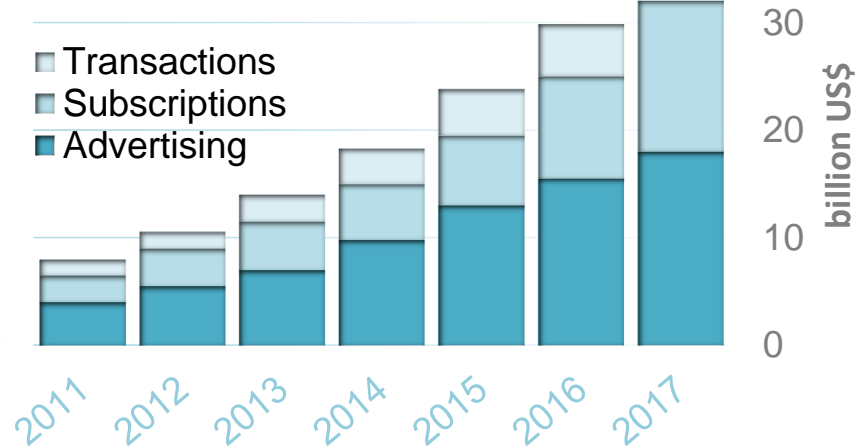
Broadcast market estimated at \$430b globally, by 2017

OTT will be 37b US\$ by 2017

- Average annual growth of 29%



Global OTT Video Revenue Forecast '11-'17





Emerging Markets
●●●● ≈36-48 mths
●●●● behind USA

Europe, Canada, Asia
●●●● ≈18-24 months
●●●● behind USA

USA
●●●●

OTT Evolution

Thank You for Your Attention.

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