

State of the Industry

Time to Switch Tracks?

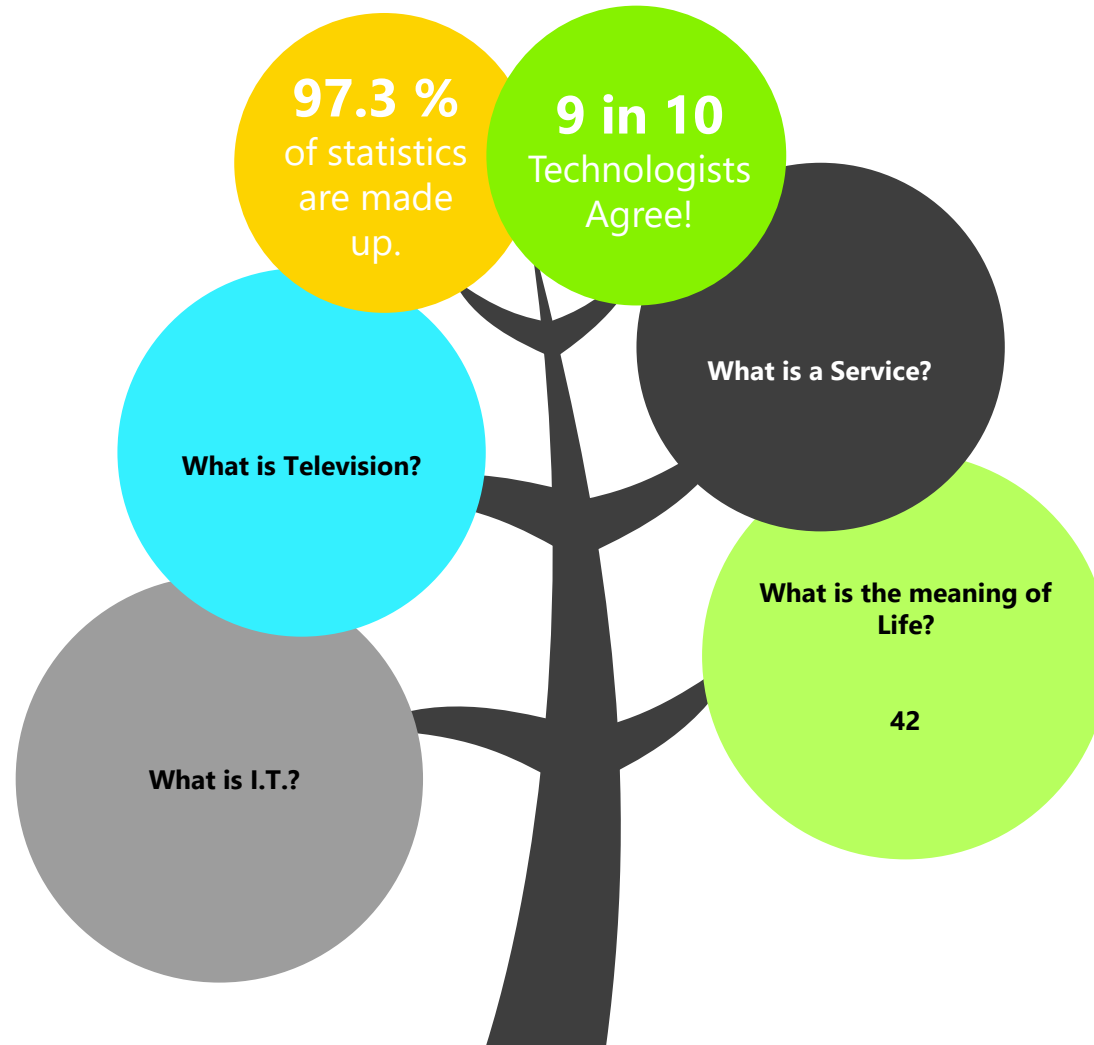


John Footen

Managing Director - Deloitte

The Obligatory Caveat

It's a fact!



The Obligatory History

Who was this Inventor?



There's nothing on it worthwhile,
and we're not going to watch it in
this household, and I don't want it in
your intellectual diet.

**HINT: Key Inventor of Electronic
Television**



(a) Philo Farnsworth

(c) Charles Jenkins

(b) John Logie Baird

(d) Kalman Tihanyi

Poll # 1 - Inventor

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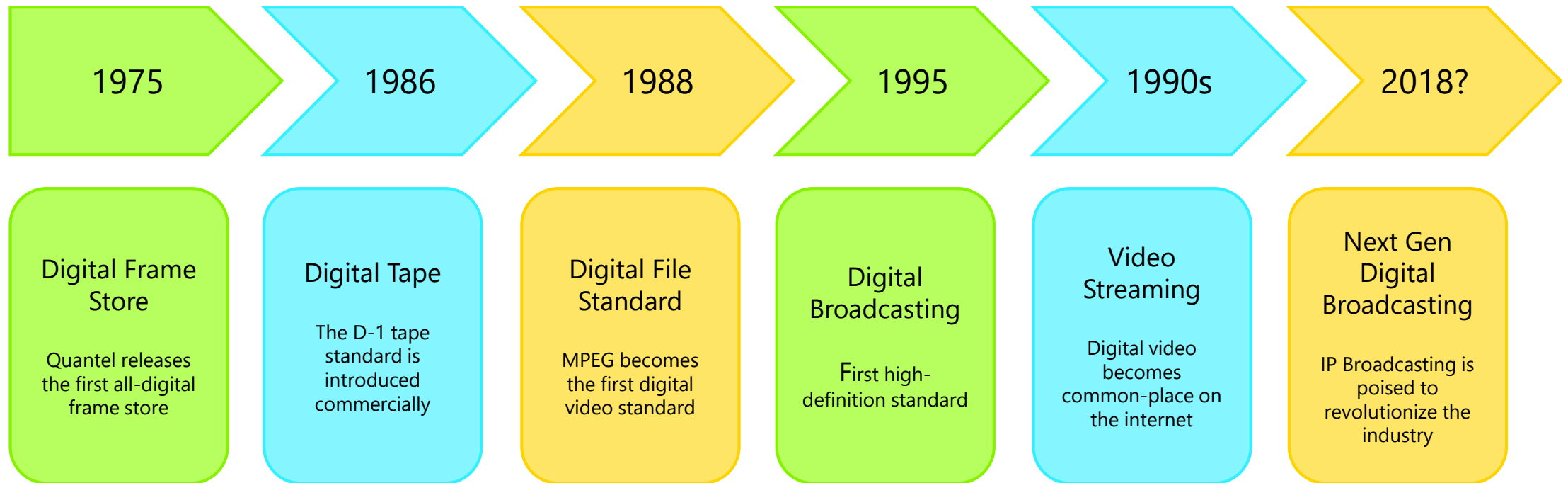
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Philo Farnsworth was an **American inventor** credited with developing one of the first **all-electronic television** systems with his first broadcast in **1927**. He went on to found the Farnsworth Television & Radio corporation, and held more than 300 patents.

Are we “Digital” Yet?

The future hasn't taken place overnight – it's been ongoing for more than 40 years

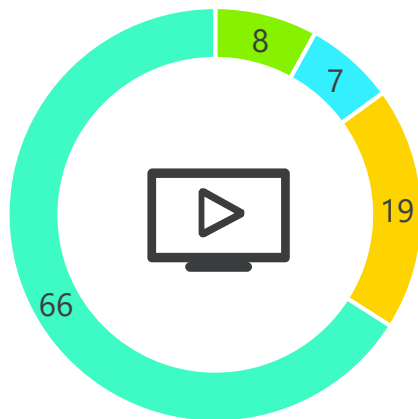


The Obligatory Present State

Poll # 2 – TV Time

The New Normal

The shift from analog to digital creates unintended consequences as TV becomes a secondary screen for younger viewers



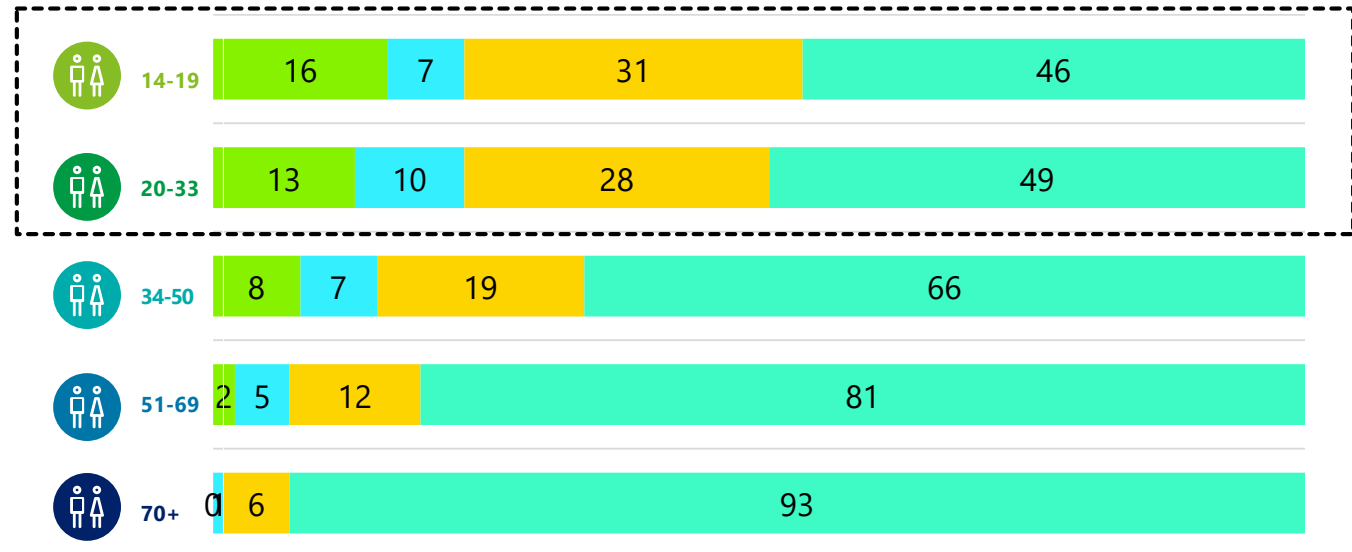
 Total 2016¹

 Smartphone

 Tablets

 Desktop/Laptop

 TV



The “end” of hardware is nigh!

Traditional hardware is giving way to software-based tools & systems



A New World

Skills Under Siege?

- Master Control Operator
 - QA/QC
 - Broadcast Technician
 - RF Engineer
 - Tape Archive Specialist
 - Film!
-
- But I have people skills!



What the US BLS Says




Job Prospects

Competition for jobs will be strong. This occupation attracts many applicants who are interested in working with the latest technology and electronic equipment. Many applicants also are attracted to working in the radio and television industry.

Those looking for work in this industry will have the most job opportunities in smaller markets or stations. Those with hands-on experience with complex electronics and software or with work experience at a radio or television station will have the best job prospects. In addition, technicians should be versatile, because they set up, operate, and maintain equipment.

An associate's or bachelor's degree in broadcast technology, broadcast production, computer networking, or a related field also will improve job prospects for applicants.

Employment projections data for broadcast and sound engineering technicians, 2016-26

Occupational Title	SOC Code	Employment, 2016	Projected Employment, 2026	Change, 2016-26		Employment by Industry
				Percent	Numeric	
Broadcast and sound engineering technicians	—	134,300	145,000	8	10,700	—
Audio and video equipment technicians	27-4011	83,300	94,000	13	10,700	 xlsx
Broadcast technicians	27-4012	34,000	32,900	-3	-1,100	 xlsx
Sound engineering technicians	27-4014	17,000	18,100	6	1,100	 xlsx

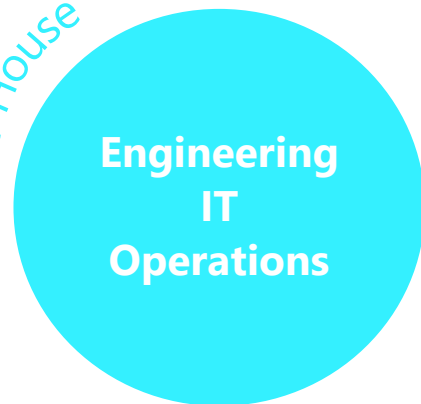
SOURCE: U.S. Bureau of Labor Statistics, Employment Projections program

Rise of the Third Party

Service providers and Vendors have allowed media companies to outsource

**Traditional employers continue to shed
salaried positions...**

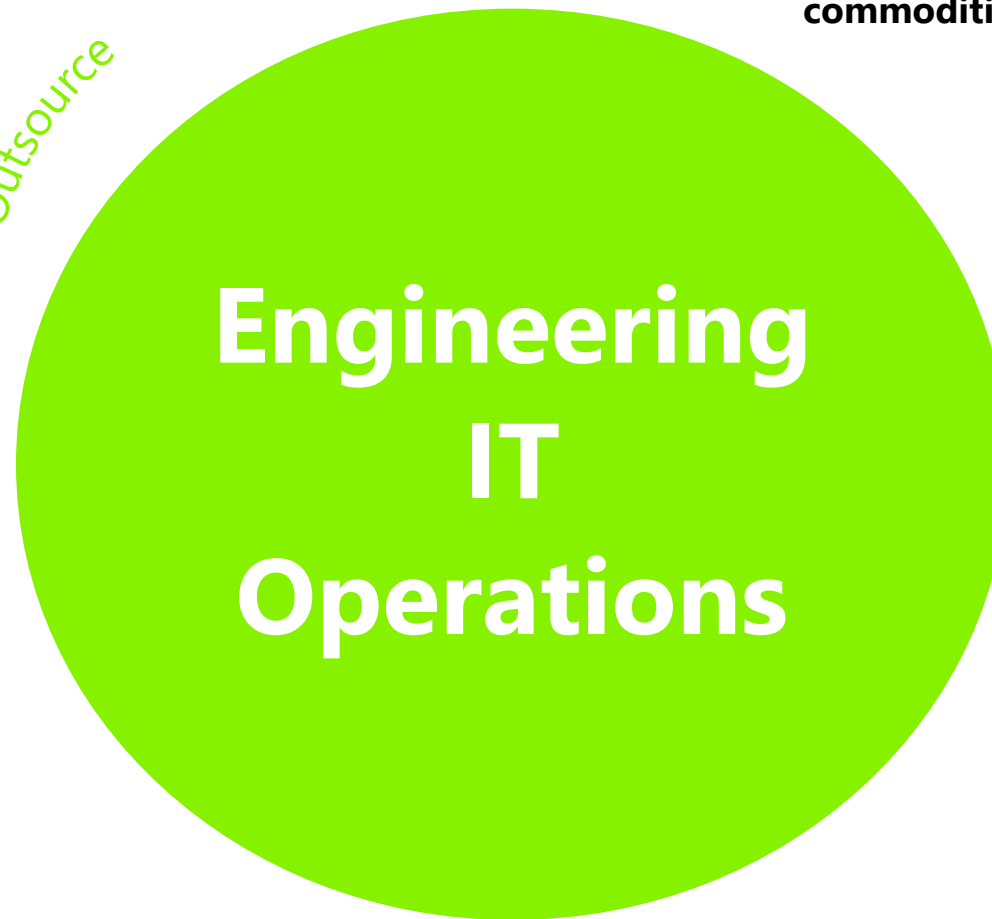
In-House



RF -> Telcos?

**While third-party outsourcers
continue rapid growth amidst
the expansion of digitized and
commoditized skillsets**

Outsource



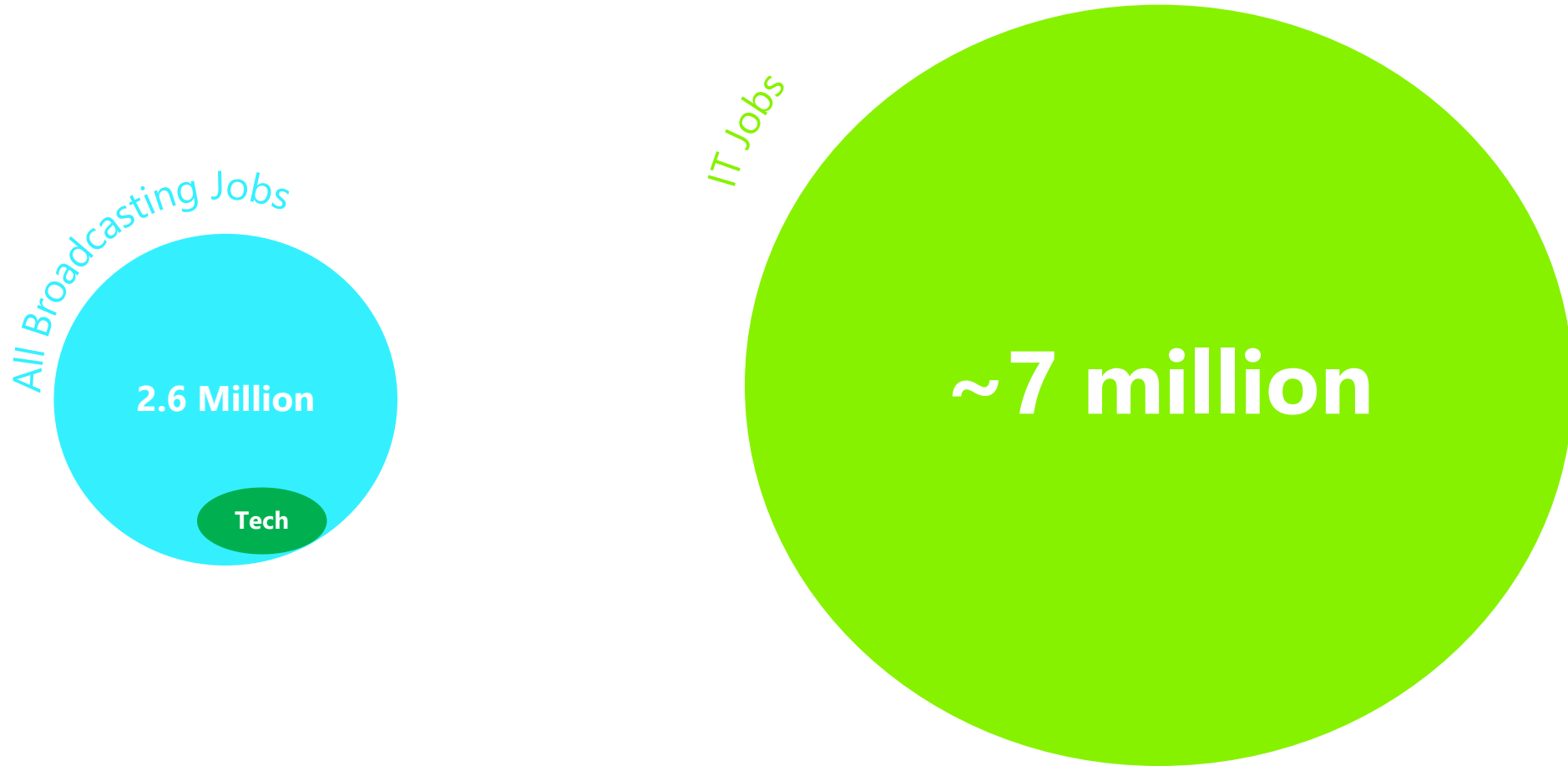
The Compulsory Future

Poll # 3 – What is Important?

Poll # 4 – Big IT

I.T. has to happen!

We are small.... (USA NUMBERS only)



Everyone is an Consultant/Integrator

Today everyone must take on a new role of integrator - between the business, technology and any third-party involved



But what about SI?

What are We Getting Right vs Wrong

WRONG

We are not
changing fast
enough

We are not close enough to the business

We need a services orientation

Too slow to develop standards

We are making the right changes

The show is “going on”

We are losing infrastructure

We are gaining new skills

We’re avoiding the
fate of the music
industry

RIGHT

The Story of an RFP

The Unnecessary Summary

The Good News

- We are all going to be fine
- New generations are coming into the business as it evolves
- Movie Theaters and radio are still around
- People are consuming more content than ever
- Technology innovation continues to accelerate
- Retirement is coming for many of you!

I want to work in TV!



Thank You!