

# IABM OTT Conference

Hassan Ghoul, IABM MEA Director

# Agenda

- 10:00 Welcome and 'update from NAB'
  - by IABM's Hassan Ghoul, Director MEA
- 10:25 Artificial Intelligence & Machine Learning applied to OTT
  - Ali Amazouz, Head of Solution Engineering MEA, Ateame
- 10:50 Ensuring Accurate, Reliable and Quantifiable QoE for OTT Services
  - Kanishka Tongya, Sales Director, MEA & APAC, Interra Systems
- 11:15 Coffee Break
- 11:50 Enabling new consumer experiences over OTT
  - Nayla Nassar, Sr. Manager – Commercial Partnerships, Dolby
- 12:15 Interview and Q&A session with Mr. Tony Saab, VP Products & Content, Intigral
- 12:45 Networking lunch

The logo for Ateame, featuring a stylized 'A' icon followed by the word 'ateame' in a lowercase, sans-serif font.The logo for Interra Systems, with 'interra' in a bold, lowercase sans-serif font and 'systems' in a smaller, lowercase sans-serif font below it.The Dolby logo, consisting of the word 'DOLBY' in a bold, uppercase sans-serif font next to a square icon containing a stylized 'D'.

# NAB Show 2018 Update

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# Market Trends

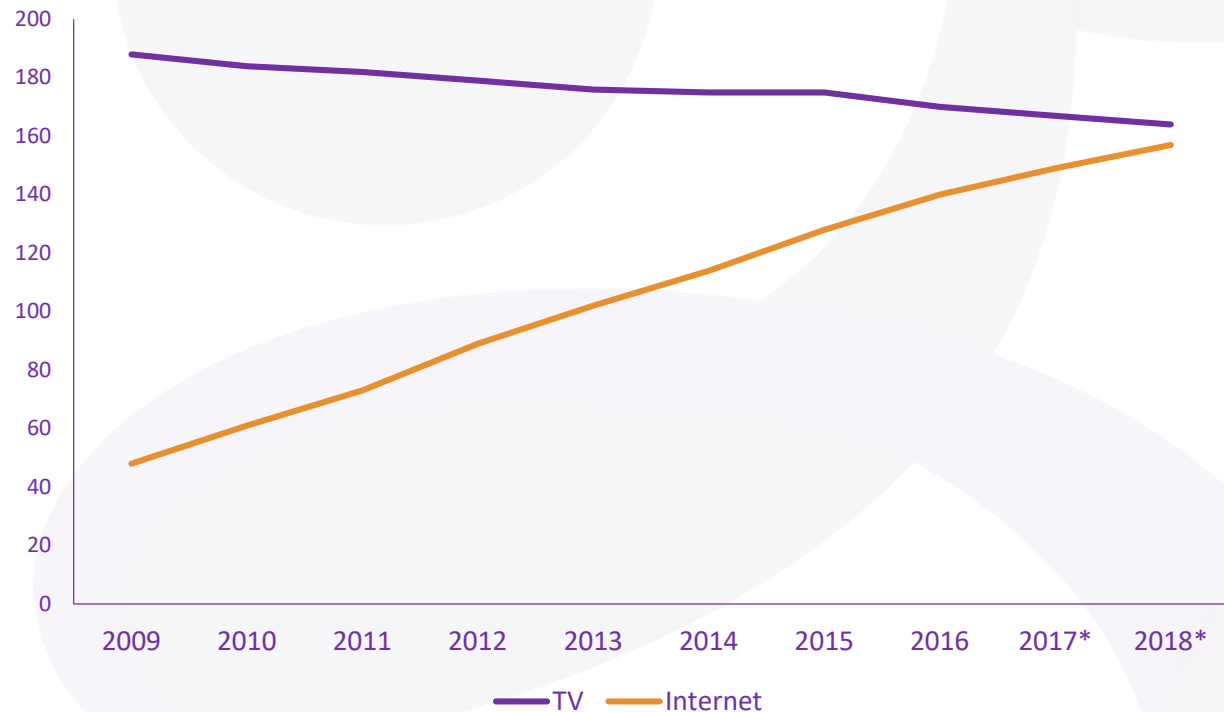


# Consumer Viewing Trends

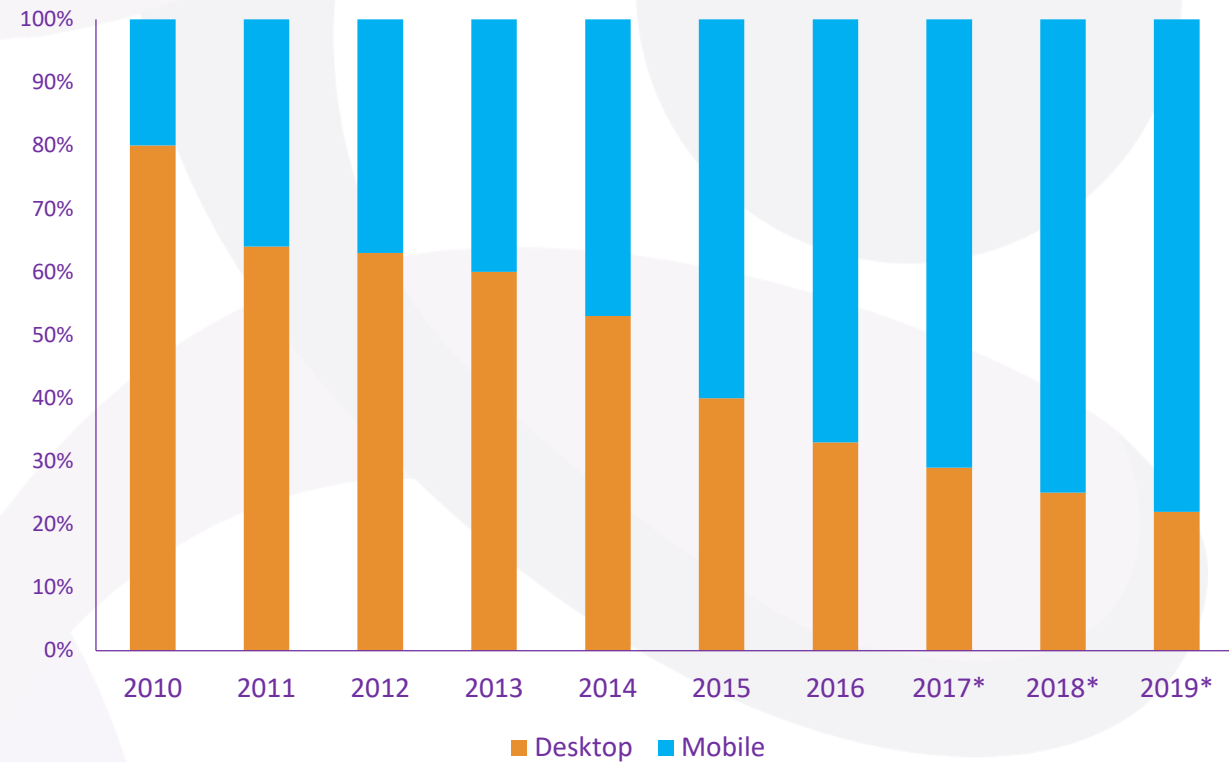
# Changing Viewing Habits

## Linear TV continues decline

Average daily media consumption per person worldwide (minutes)  
2009 – 2018\*



Desktop versus mobile share of global internet users (%) 2010 – 2019\*



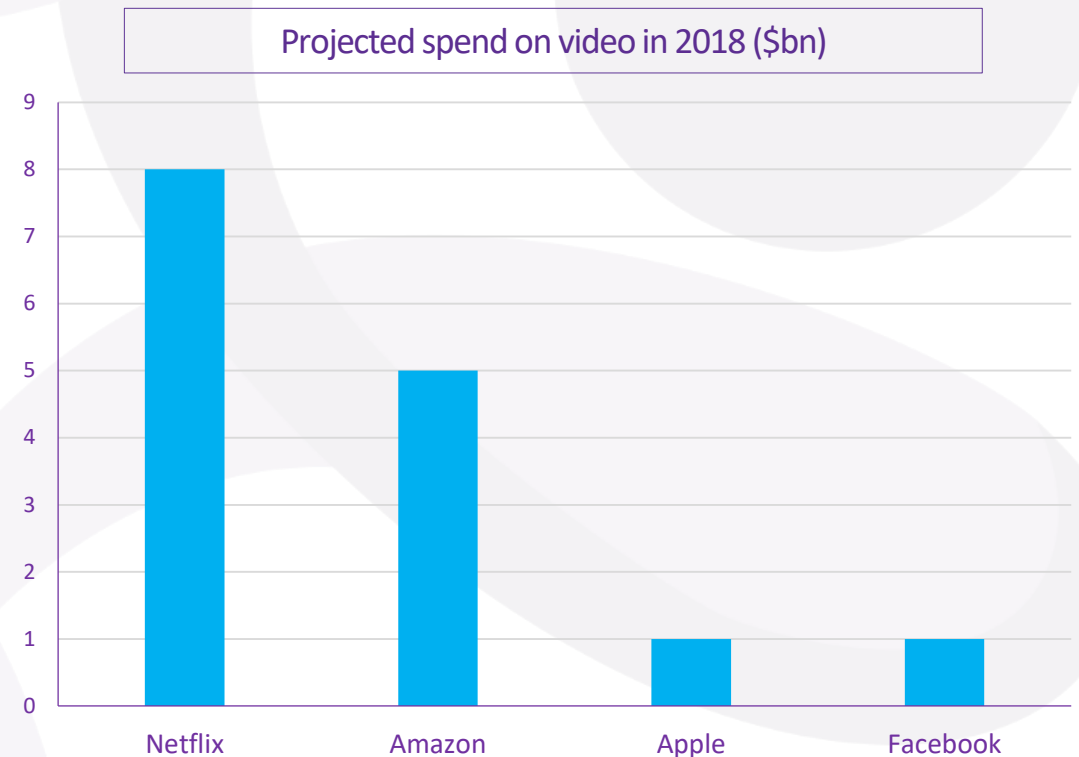
Source: Zenith

# Media Business Trends

# Competition intensifies

## Big Tech investing in content

- Big Tech is entering the competition for consumer attention
- Apple and Facebook set to spend \$1bn each on content this year
- Netflix is investing \$8bn in original content while Amazon invests around \$5bn in 2018
- Technology companies also recruiting top TV talent
- Competitive pressure is driving consolidation among traditional broadcasters and media companies
- As content moves online, advertising also goes digital



Source: IABM, The Wall Street Journal



# End-User Consolidation

## Search for Scale



- Disney to buy Fox entertainment assets for \$66.1bn (including debt)

- Deal includes Fox's stake in satellite broadcaster Sky

- Disney to launch its streaming services

- Fox has been trying to buy the remaining 61% stake in Sky for £11.7bn

- Deal has been caught up in regulatory hurdles

- Fox's acquisition of Sky is included in the assets Disney will purchase

- Sky has been described as Fox's "crown jewel" by Disney's CEO, Bob Iger

- Sky has previously supported Fox's bid

- The recent bid by Comcast could start a bidding war

- Comcast made an £22bn official bid for Sky

- Complicates the plans that Disney has for Sky as Fox is unable to acquire Sky

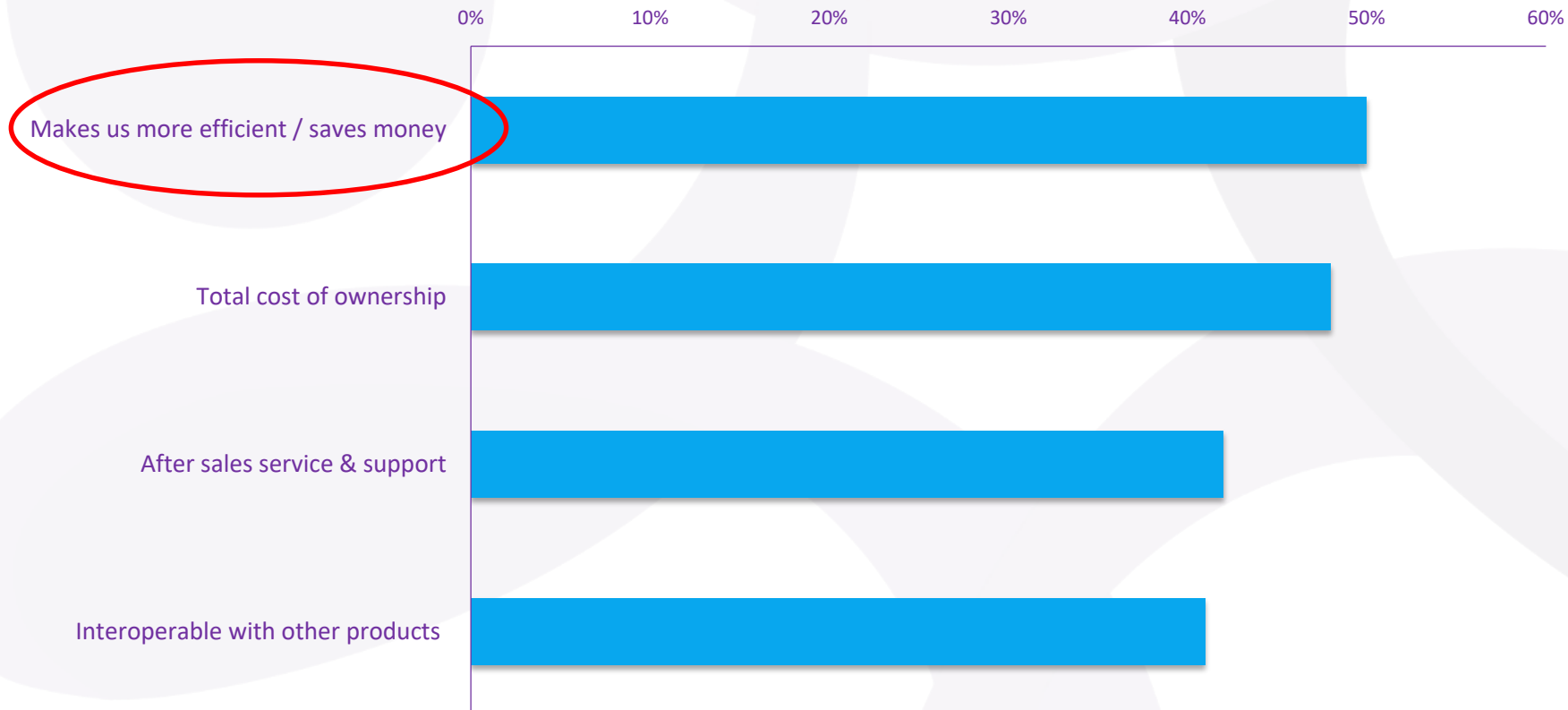
- Sky recently withdrew its recommendation for the Fox bid

# Buying Trends

# Efficiency First

## Always No. 1

Most important factors affecting purchase decisions besides costs and technical specification



Source: IABM Buying Trends Survey

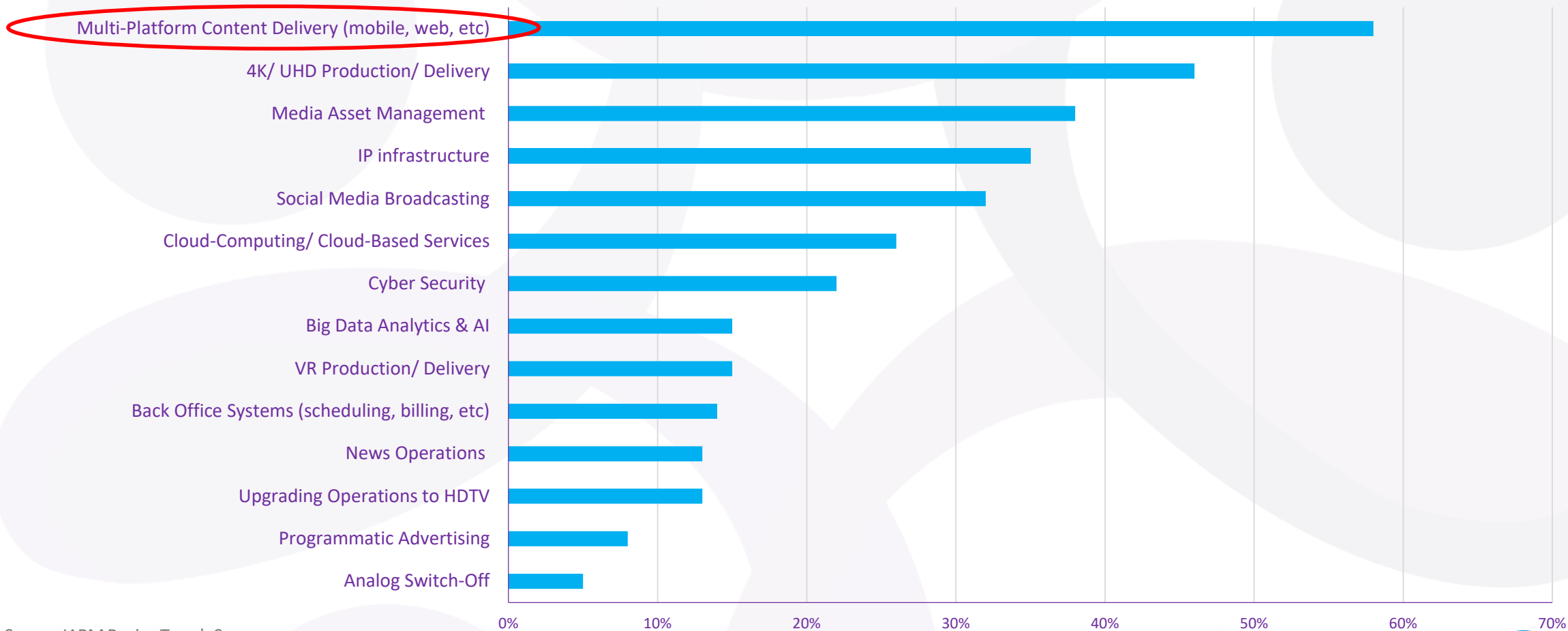


# Purchasing Priorities

## Multi-Platform Content Delivery takes the lead



What are the most important priorities in your broadcast and media purchasing strategy?



Source: IABM Buying Trends Survey



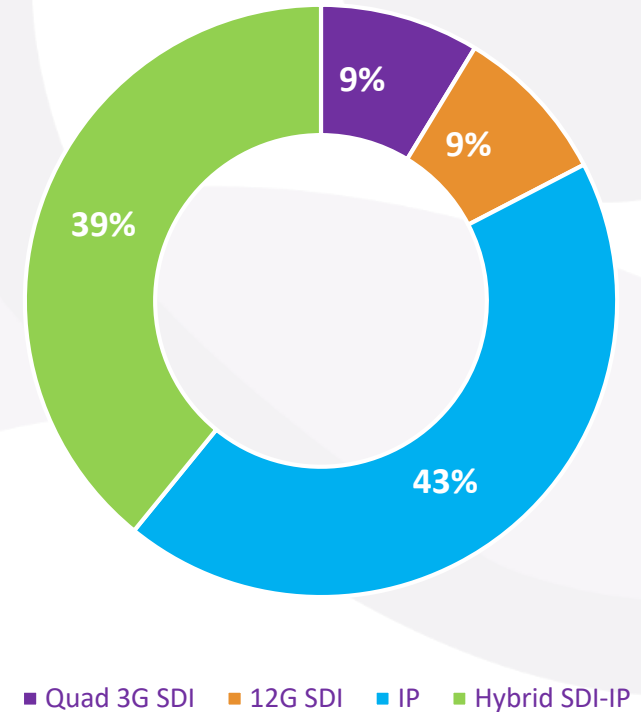
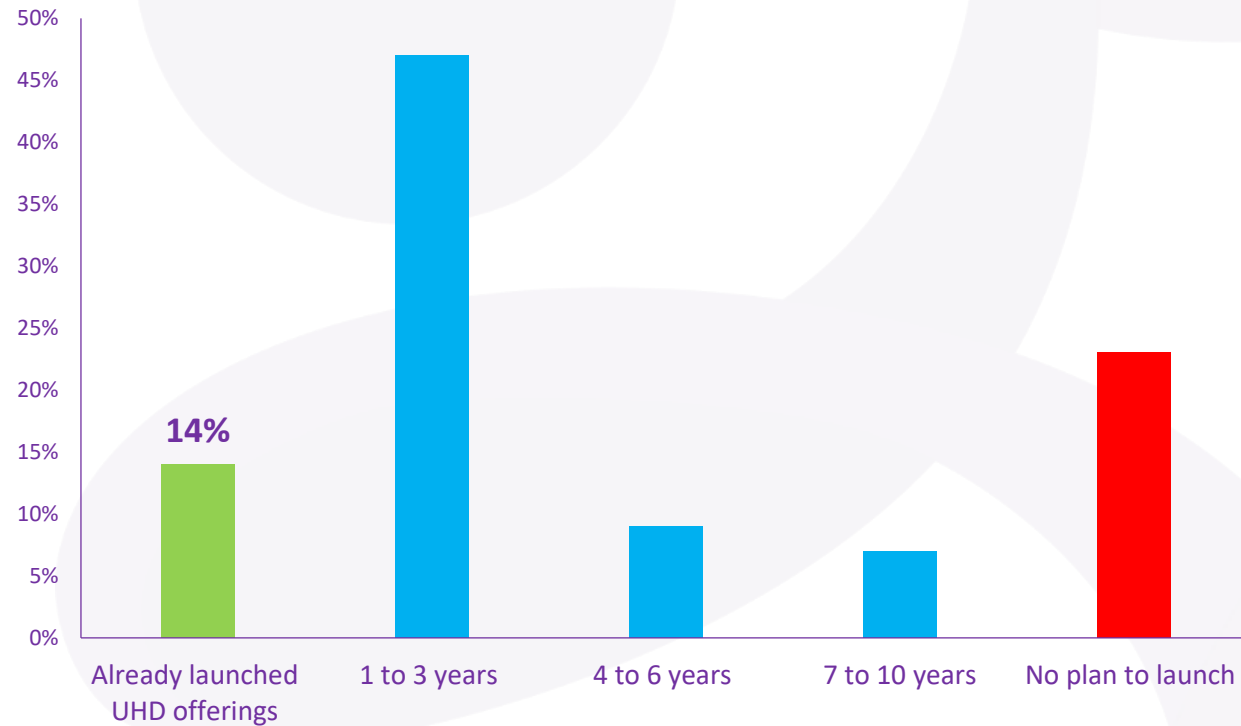
# UHD

## UHD set to accelerate



What is the most likely timeline for the launch of UHD offerings in your organization?

Which of the following technology infrastructures does/ has your organization plan to deploy/ deployed for UHD content?



Source: IABM Buying Trends Survey



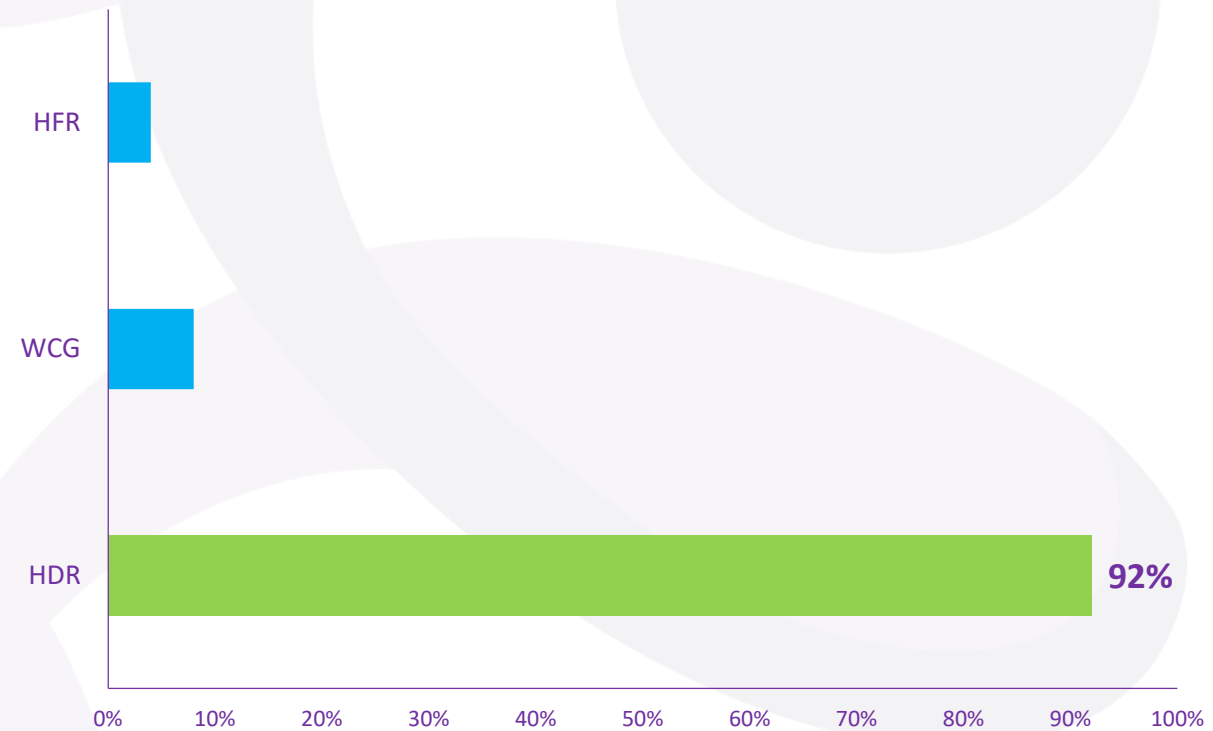
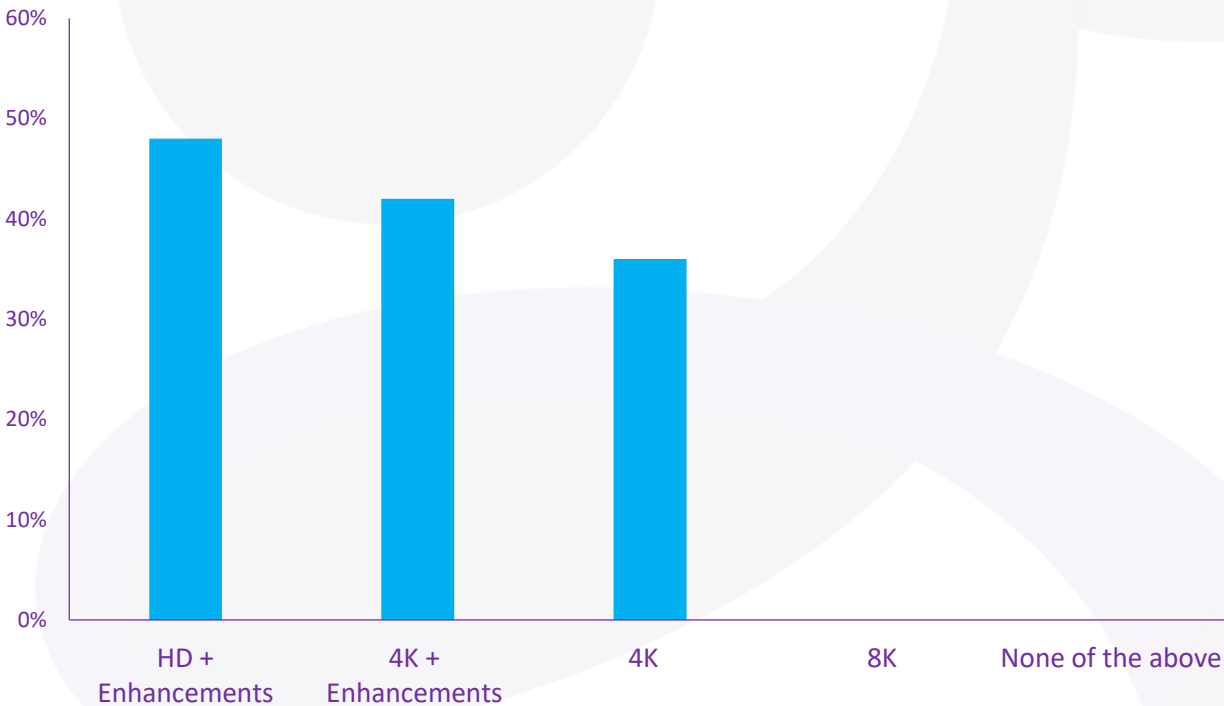
# UHD

## Better pixels > More pixels



Which of the following UHD formats is your organization interested in launching/ has launched?

Which of the following enhancements is your organization interested in/ has launched?



Source: IABM Buying Trends Survey



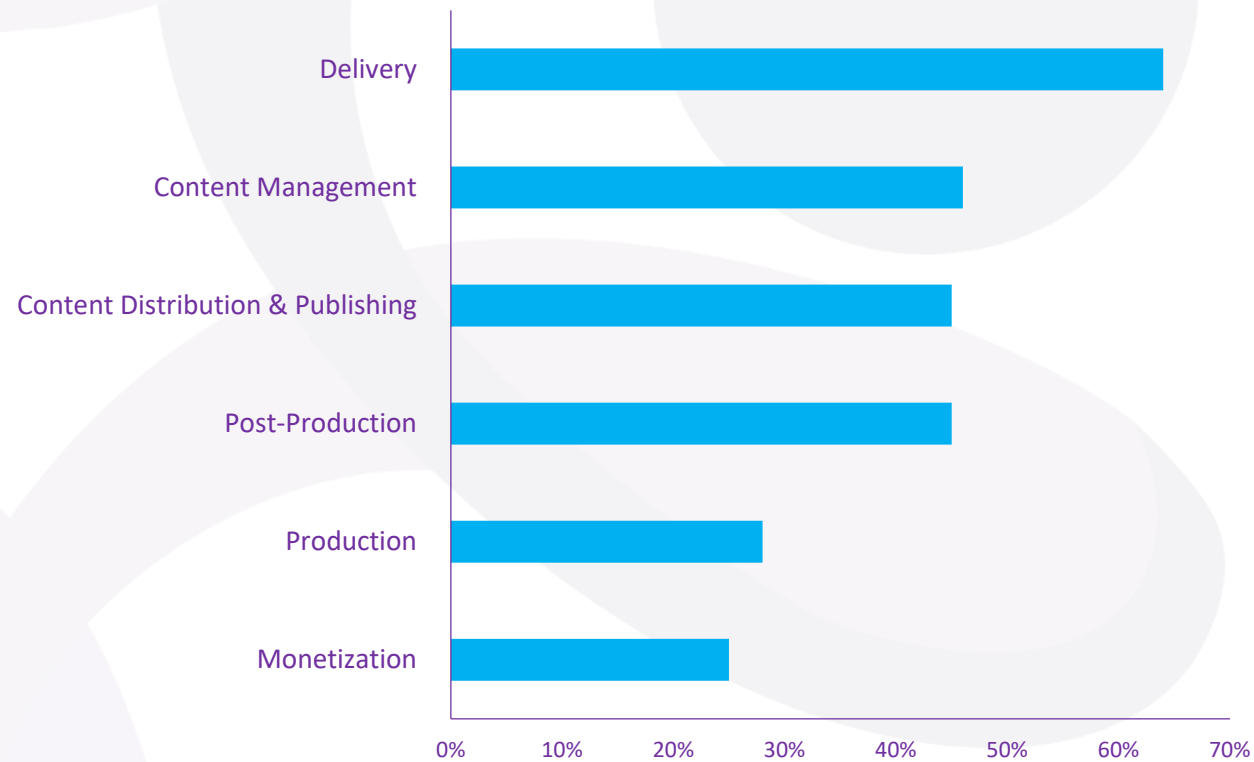
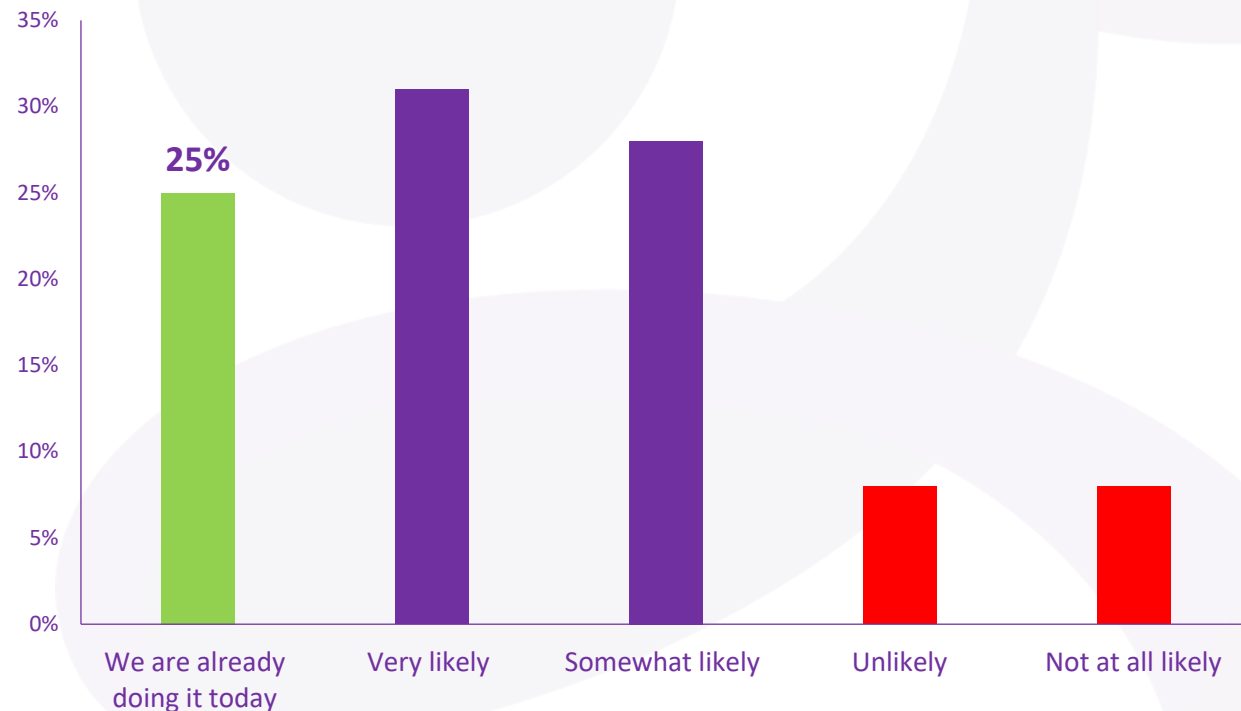
# Cloud Adoption

## Growth continues



How likely are you to deploy some sort of cloud-based technology over the next 2-3 years?

In which of the following categories of broadcast and media workflows are you most likely to deploy cloud-based technology?



Source: IABM Buying Trends Survey

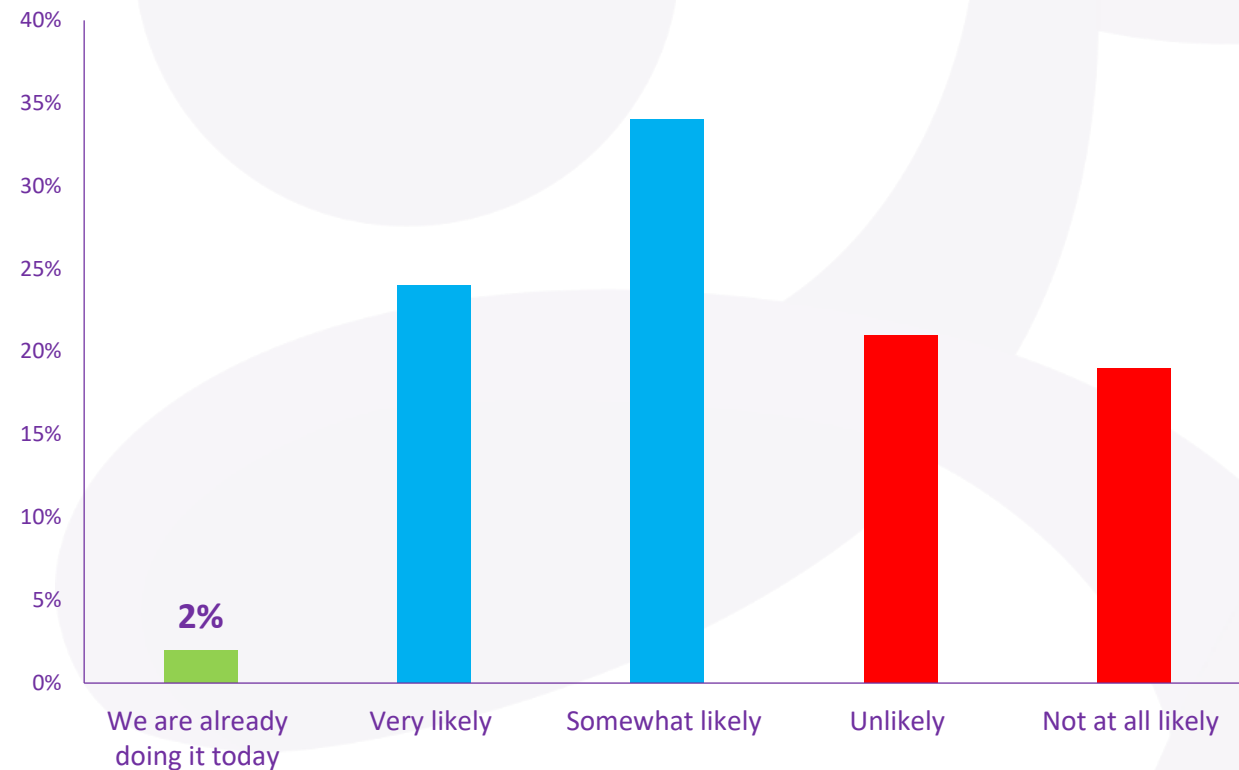


# AI

## At early stages of adoption



How likely are you to deploy some sort of artificial intelligence (AI) technology over the next 2-3 years?



Source: IABM Buying Trends Survey

- At early stages of adoption
- Increased number of end-users likely to deploy AI in the next few years
- Most applications in content management
- AI can be used in conjunction with cloud technology for deeper insights into data



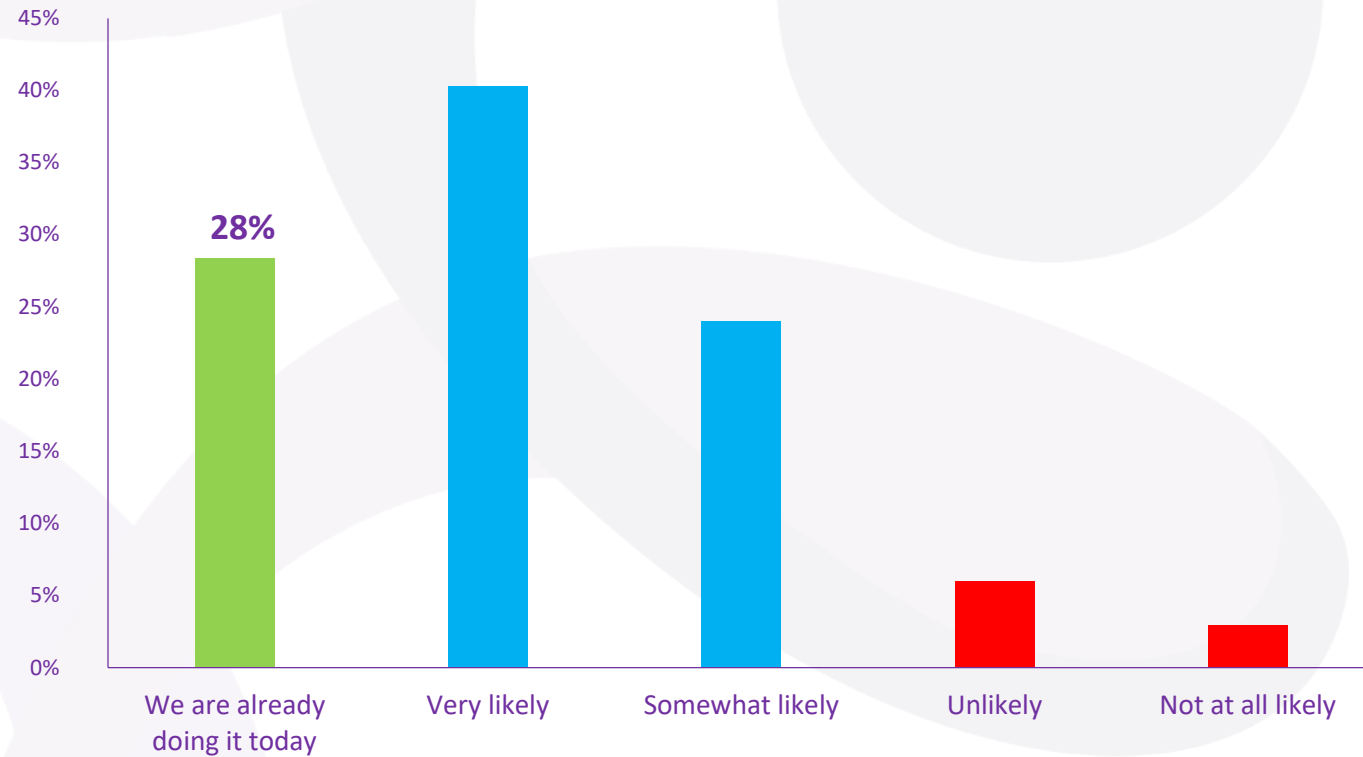
# IP

## The transition is inevitable



- IP adoption increasing gradually and set to grow in 2018
- The finalization of SMPTE ST 2110 this year will accelerate adoption of IP
- Cost of upgrading infrastructure from SDI and culture changes are significant challenges
- Many end-users adopting a gradual approach similar to cloud technology

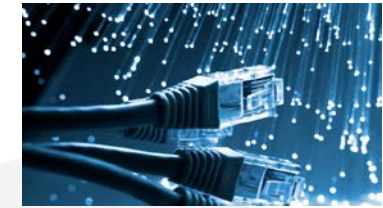
How likely are you to transition all or part of your infrastructure from SDI to IP technology over the next 2-3 years?



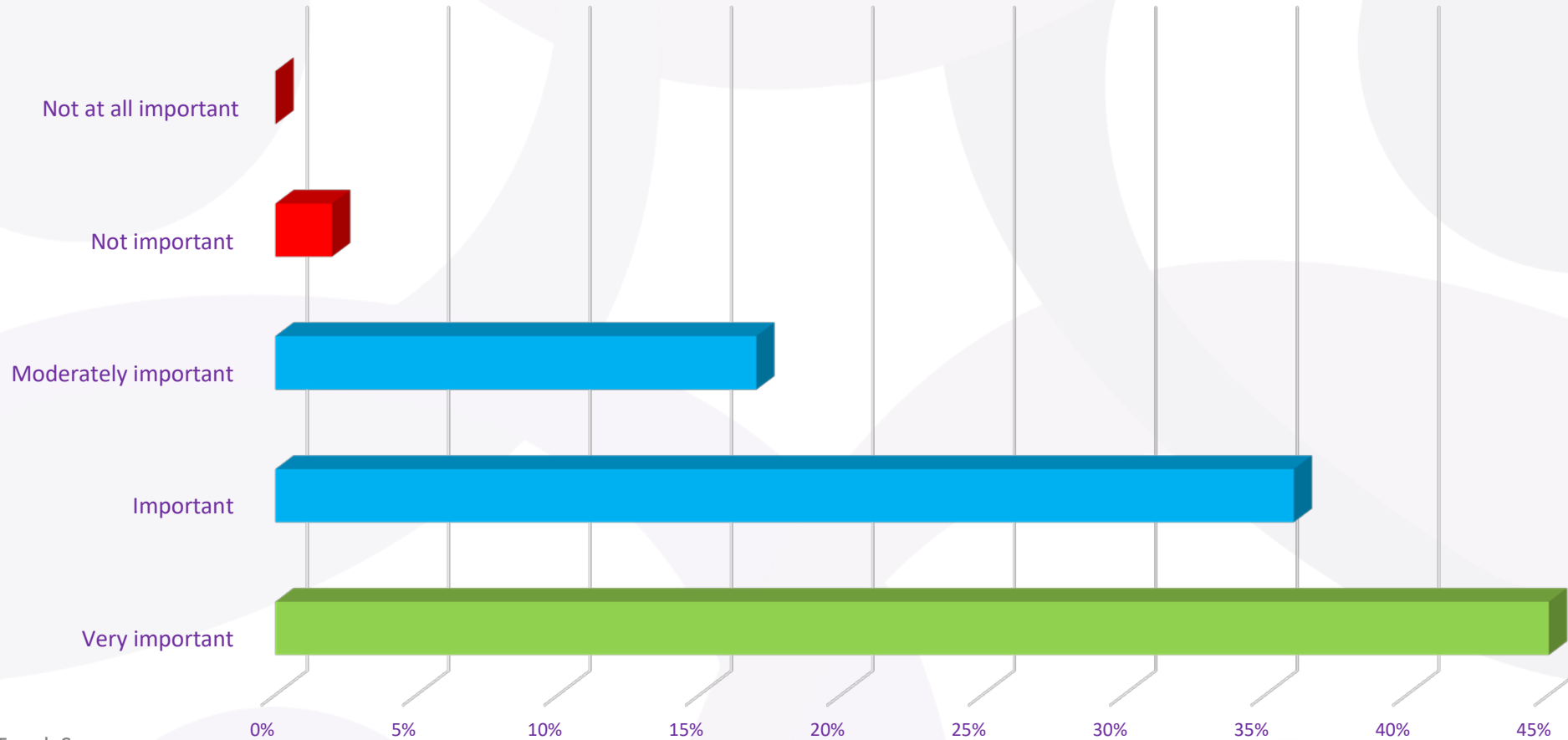
Source: IABM Buying Trends Survey

# Interoperability

## Importance of interoperability is growing



How important is interoperability between systems when evaluating products for your organization's next generation media technology infrastructure?



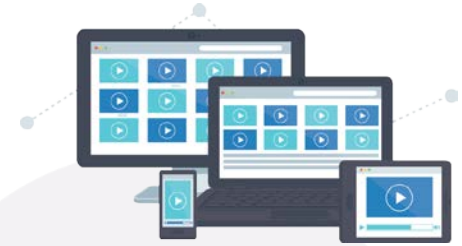
Source: IABM Buying Trends Survey



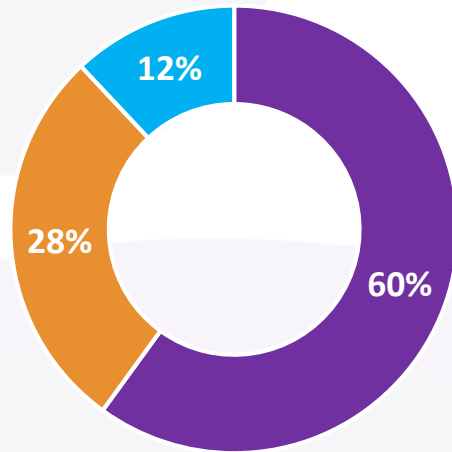
**OTT**

# OTT

## OTT offerings on the rise

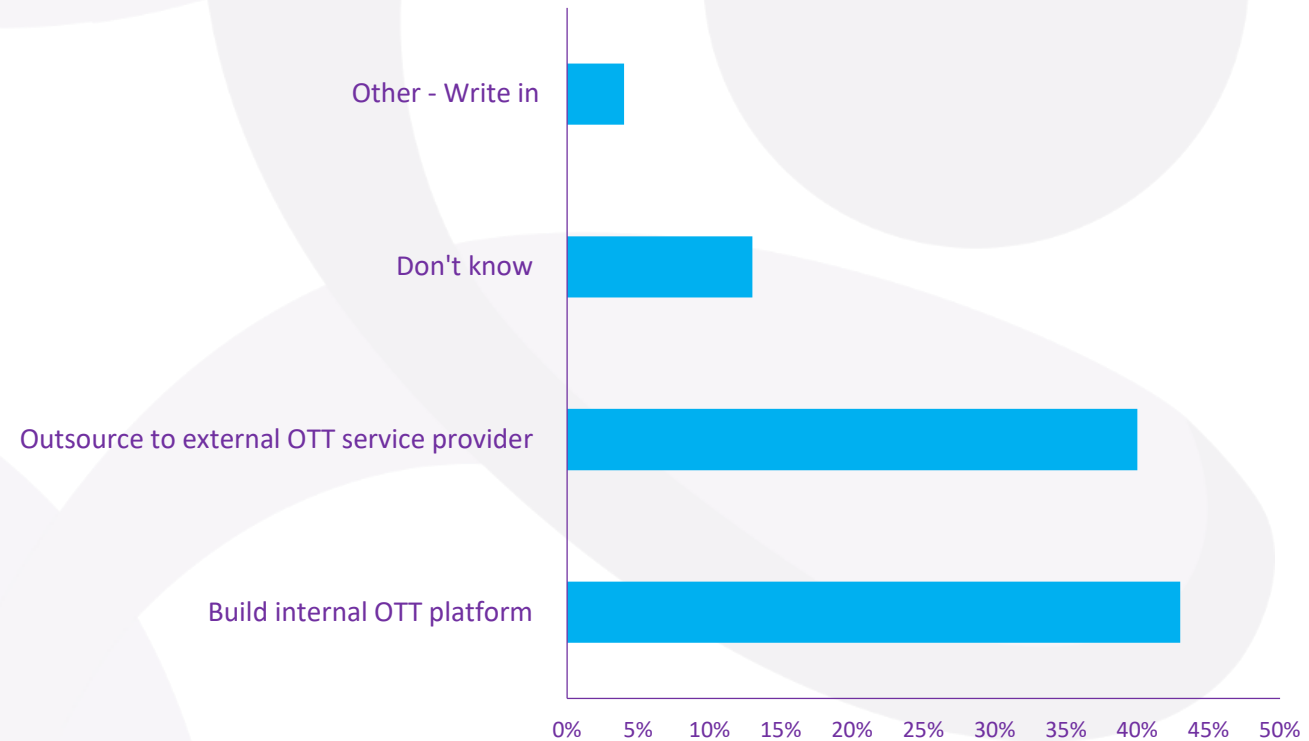


Does your organization provide or plan to provide any OTT offering/s to customers?



- Yes, we already provide OTT offering/s to our customers
- Yes, we plan to provide OTT offering/s to our customers
- No, we do not provide OTT offering/s to our customers and do not plan to provide any in the near future

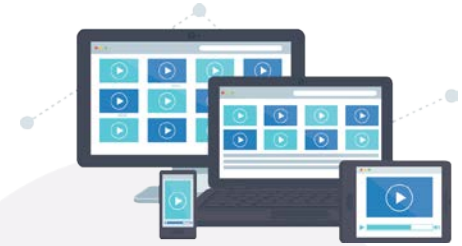
For the provision of OTT offering/s, what is your preferred deployment strategy?



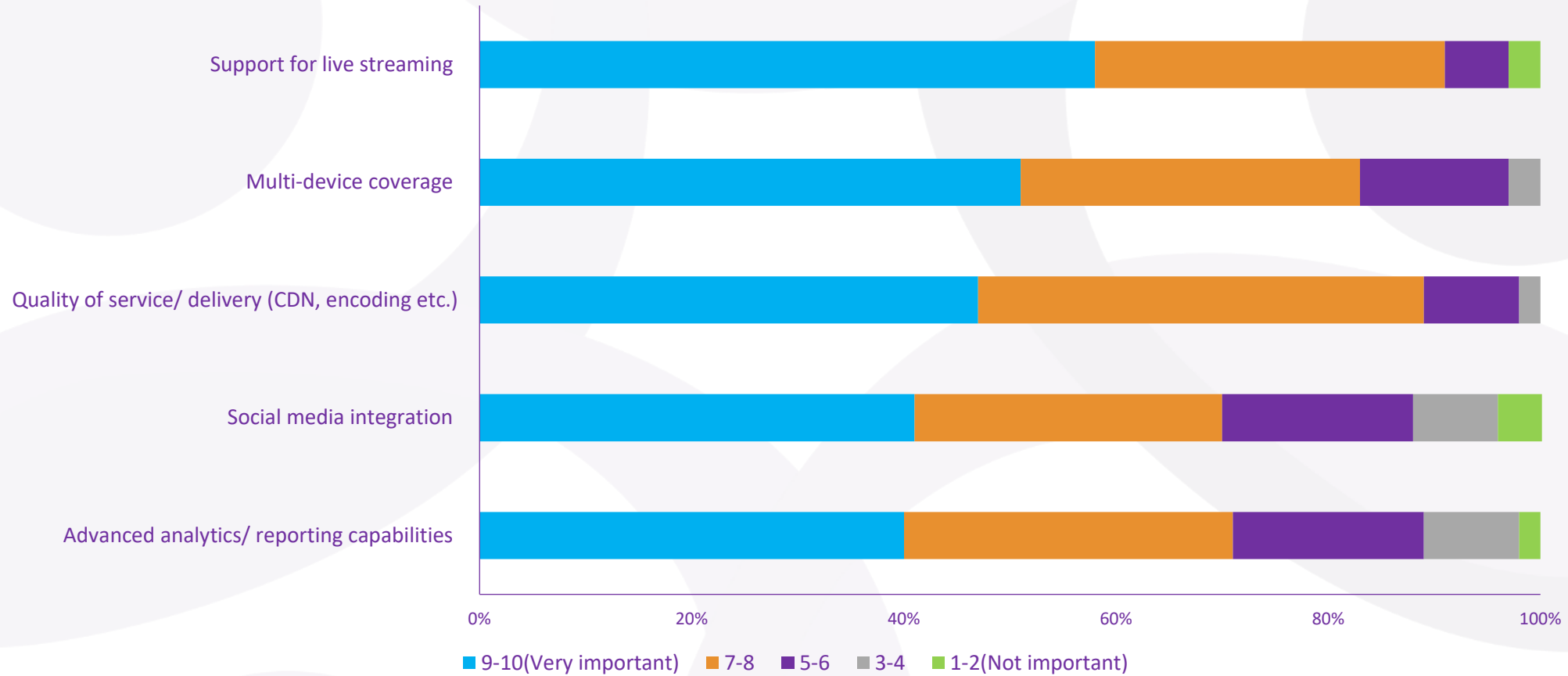
Source: IABM Buying Trends Survey

# OTT

## OTT offerings on the rise



Top 5 features when building/ choosing an OTT platform?

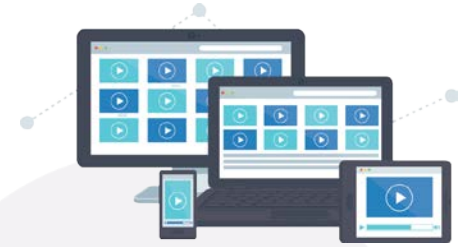


Source: IABM Buying Trends Survey

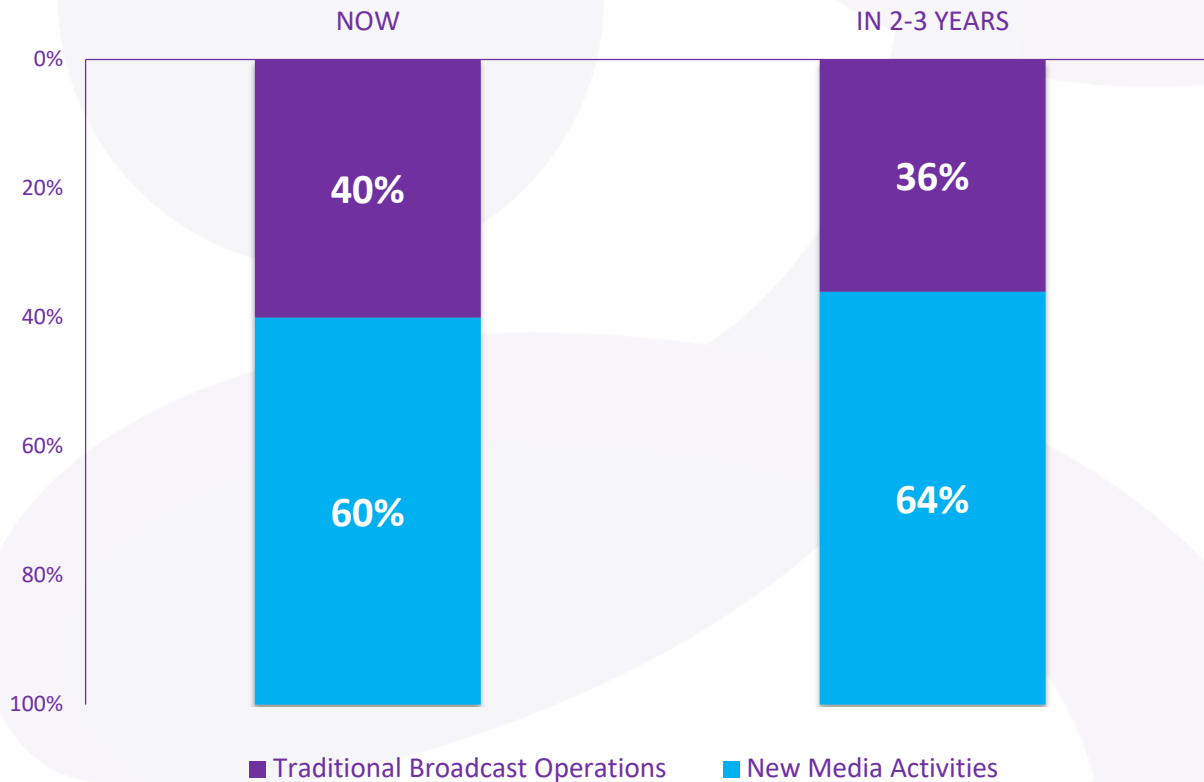


# OTT & Multi-Platform Delivery

## New media activities to generate revenues



Average percentage revenue from traditional broadcast operations versus new activities such as web, mobile, streaming, multi-platform content delivery



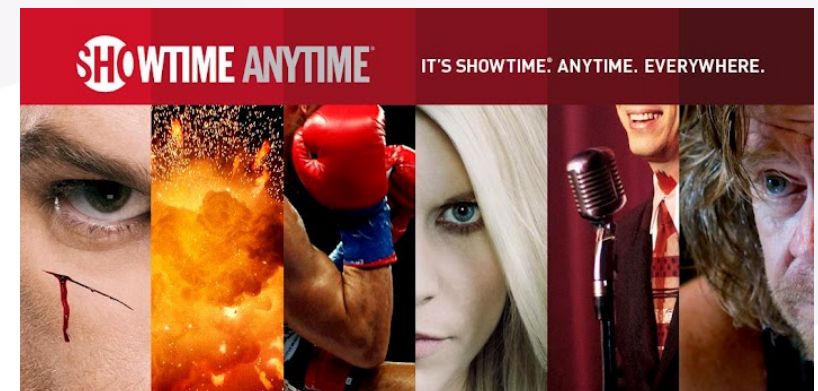
- OTT & multi-platform delivery continues to disrupt traditional broadcasting
- New media offerings driven by consumer viewing habits and increased competition
- Finding a balance between traditional and new media offerings continues to drive search for efficiency
- End-users continue to invest to bring skills in-house

Source: IABM Buying Trends Survey

# Digital Chaos

## Direct-to-consumer offerings on the rise

- Media companies are increasingly launching direct-to-consumer offerings
- HBO, CBS and Showtime have all launched direct OTT services
- Disney decide to pull its content from Netflix to launch its own streaming service in 2019
- Increasing number of streaming services creates an environment of confusion for consumers
- Agility and personalization are key



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