



**OTT
&
THE EXCITING UNCERTAIN
FUTURE OF TV**

WBU-ISOG



VOD/ TIME SHIFTED

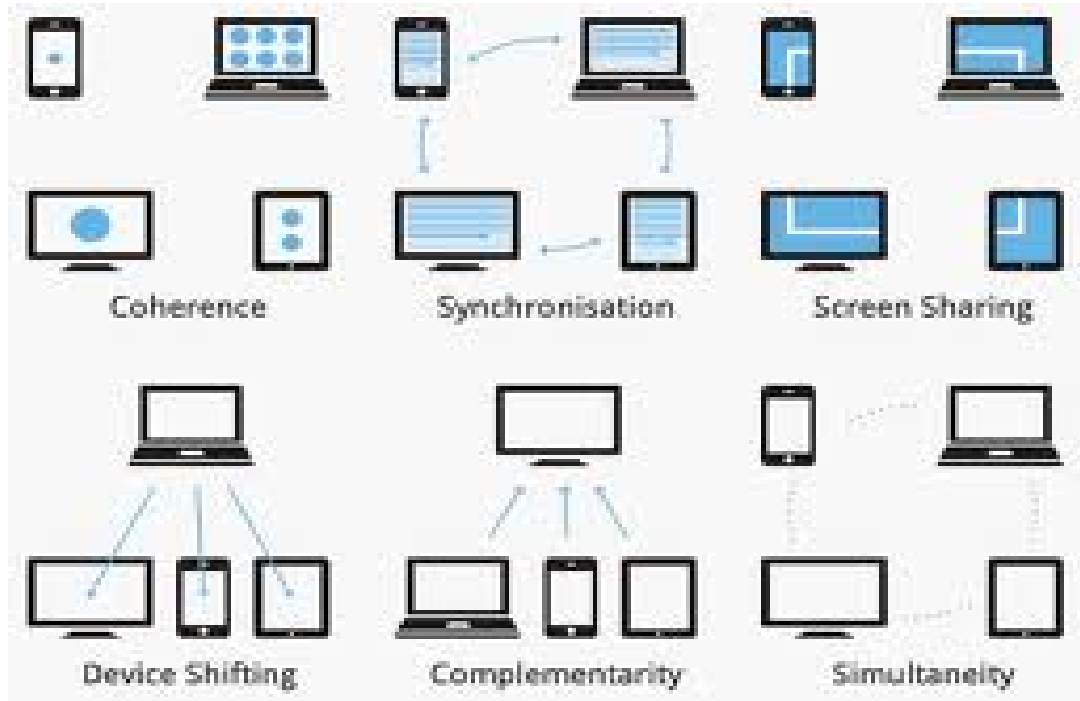
- Nearly everyone considers OTT to be confined to VOD/ Time shifted archived programming
- Primarily in Movies (Netflix, Amazon Prime & Apple TV)
- Primarily in TV Shows, Hulu, Xfinity
- Google TV & Roku platforms for Internet content

MULTIPLE PLATFORMS



- Consumers want content on multiple platforms
- Want it anywhere and anytime
- Is it short form content? Time will tell

MULTI SCREEN EXPERIENCE



- Consumers want more information on their content
- TV is a passive experience/ how to add social aspect
- Customer devices connected to each other to share experiences
- Search & fetch functions with integrated programming on remote (buddyTV/ Peel Apps)

BROADCASTERS



- Big four broadcasters still have a large portion of LIVE audience for their shows
- Many smaller players are challenging the status quo
- Transmission rights for smaller players?
- Transmission rights beyond the range of broadcast channel transmission
- Is it feasible in the era of IP delivery?

CABLE NETWORKS



- The major broadcasters also own large chunks of Cable Networks
- Existing Business Model and MFN makes it difficult for new entrants
- Basic, Standard, Digital, Premium, Content Packages and how they will evolve
- Fragmentation of ingest of video

WIRED & WIRELESS PLATFORMS

MVPD



- Existing Business Models & Agreements currently safeguard MVPDs
- Decline in video subscribers from the last 3 years
- Gain in free cash flow, increasingly attractive with loss of video customers
- Focus on increasing bandwidth pipes to consumers
- Comcast putting caps. Ongoing discussion.. 300 Gigs per month?
- TWC running ads to attract consumers to ingest online content without any caps
- Dish looking to deliver a four platform experience in the future
- Last mile access is critical and controlled by the MVPDs
- With LTE Verizon & AT&T control wireless access
- Is the new marketing & business arrangement for Spectrum between Verizon, Comcast, TWC & BrightHouse good for the future
- Will customers lose with a few players controlling access to the Internet

MVPD & PROGRAMMERS



hulu



- Although provides access to content, it safeguards existing business models and creates a hurdle for new entrants
- Not a multichannel experience as customer needs to go to individual websites
- Will work only for major brands
- Is Hulu's new validation model a future for TV Everywhere (controlled by programmers)
- Do Customer's have a choice? Will they accept the current business model?

Current Programming *News, Finance & Sports*



Focus on 24 hour LIVE News & Sports Channels

- RTV delivers mainstream TV/ virtual MSO/ OVD
- Add Niche programming as and when available
- Add Internet only programming channels to the mix
- Target market Business customers in US
- Deliver via the Internet to anywhere in US

Future Success for an OTT IP service



- Content is King
- A Mixed of New Internet content & mainstream content
- Niche content that is on the upper dial of the Cable spectrum dial (Education, Lifestyle)
- Foreign News Channels
- Niche Sports Channels
- Mobile
- Access to content anytime anywhere on any platform
- Multichannel experience from one single portal
- New Business Models to create a much more customer friendly experience



- Future is unknown but we know for sure that the next video platform will be the Internet
- New players delivering OTT
- Mix of mainstream programming and new content catering to the new generation
- MSOs will control the broadband infrastructure
- They will be challenged eventually by the wireless providers if they choose to do so.

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