



19 Charts for 2019

January 2019

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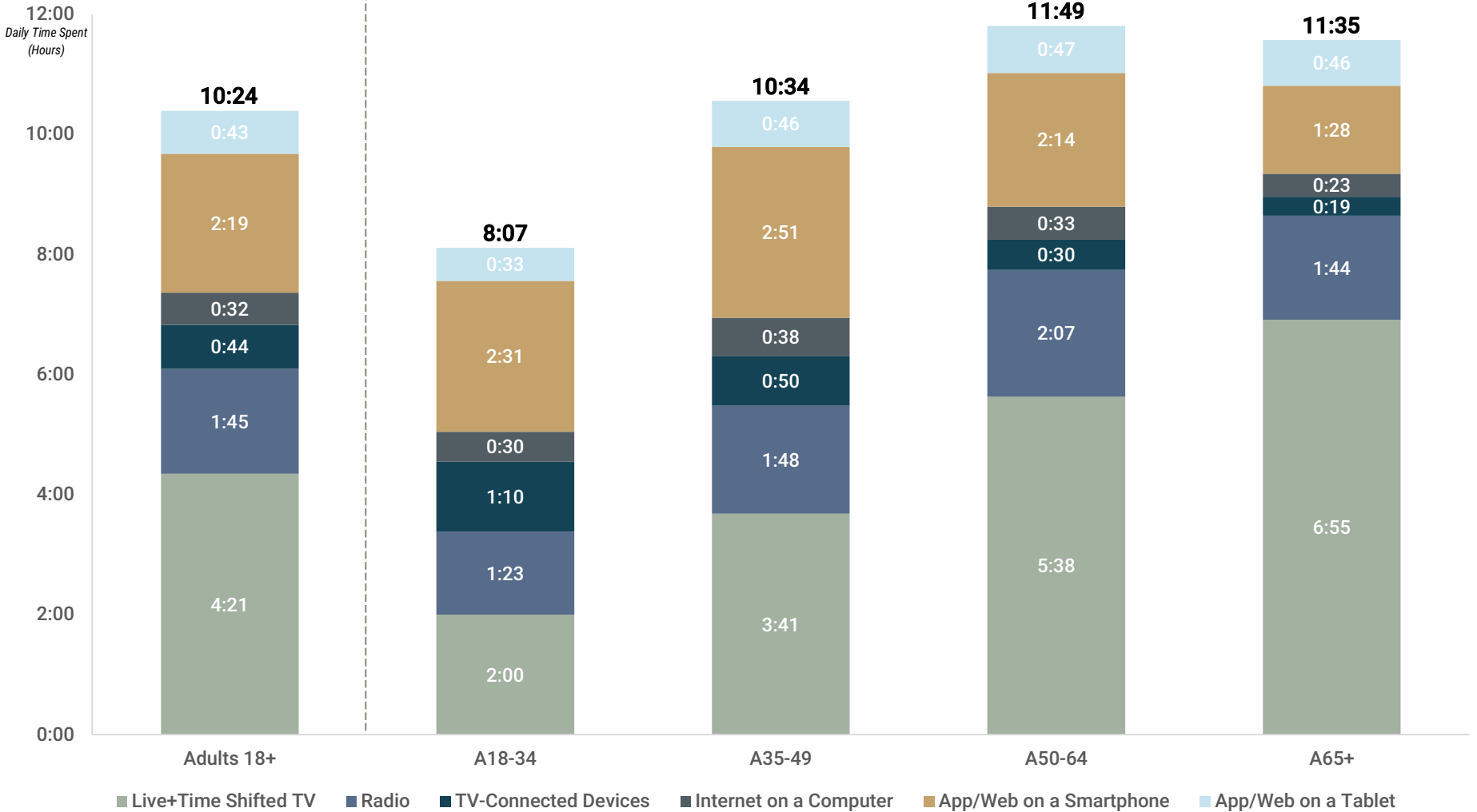


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Time Spent With Media

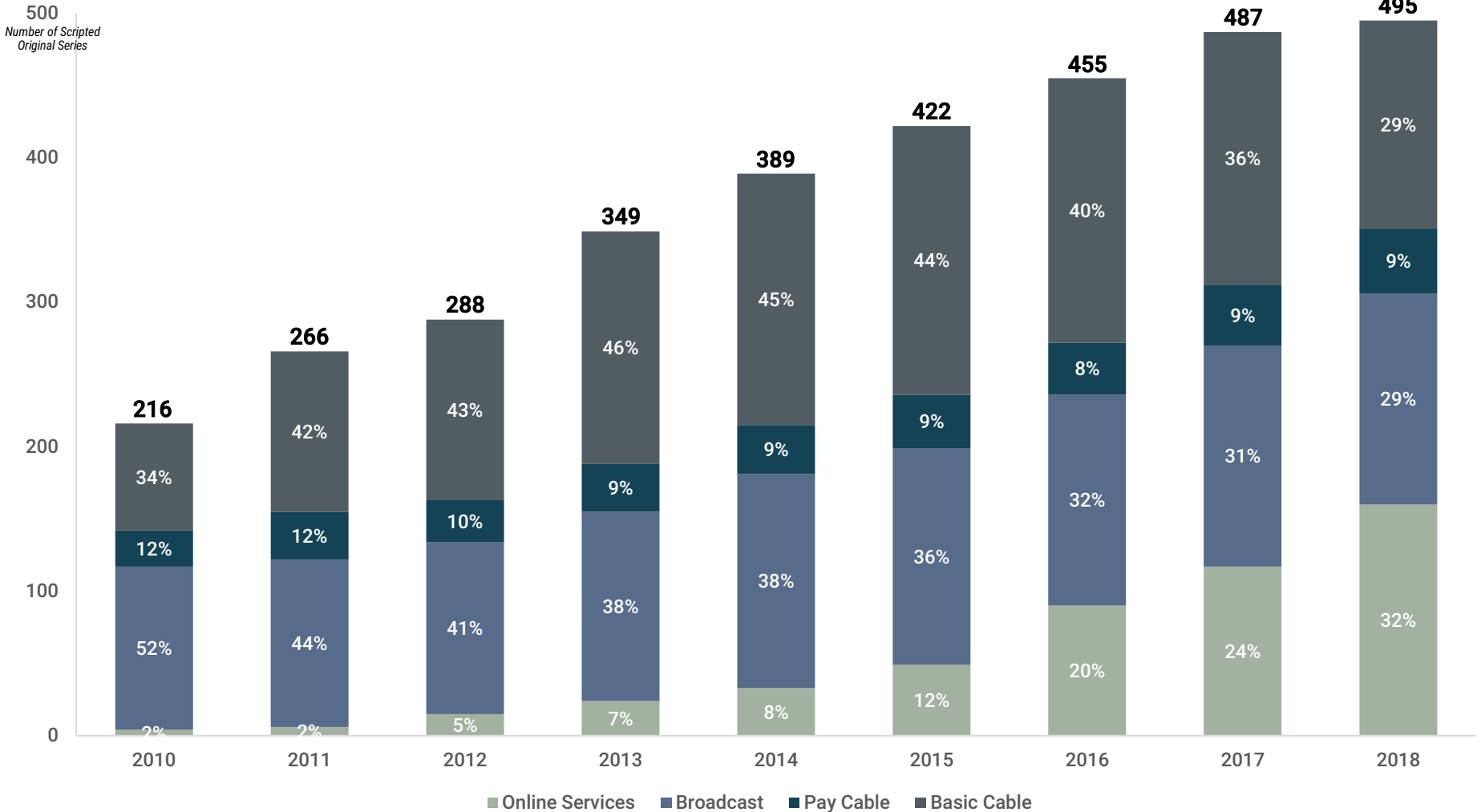
With Each Generation, There Is A Further Shift Of Media Consumption Happening Away From The TV Screen



How will legacy media companies evolve their distribution strategies to reach consumers through new devices?

Scripted Series

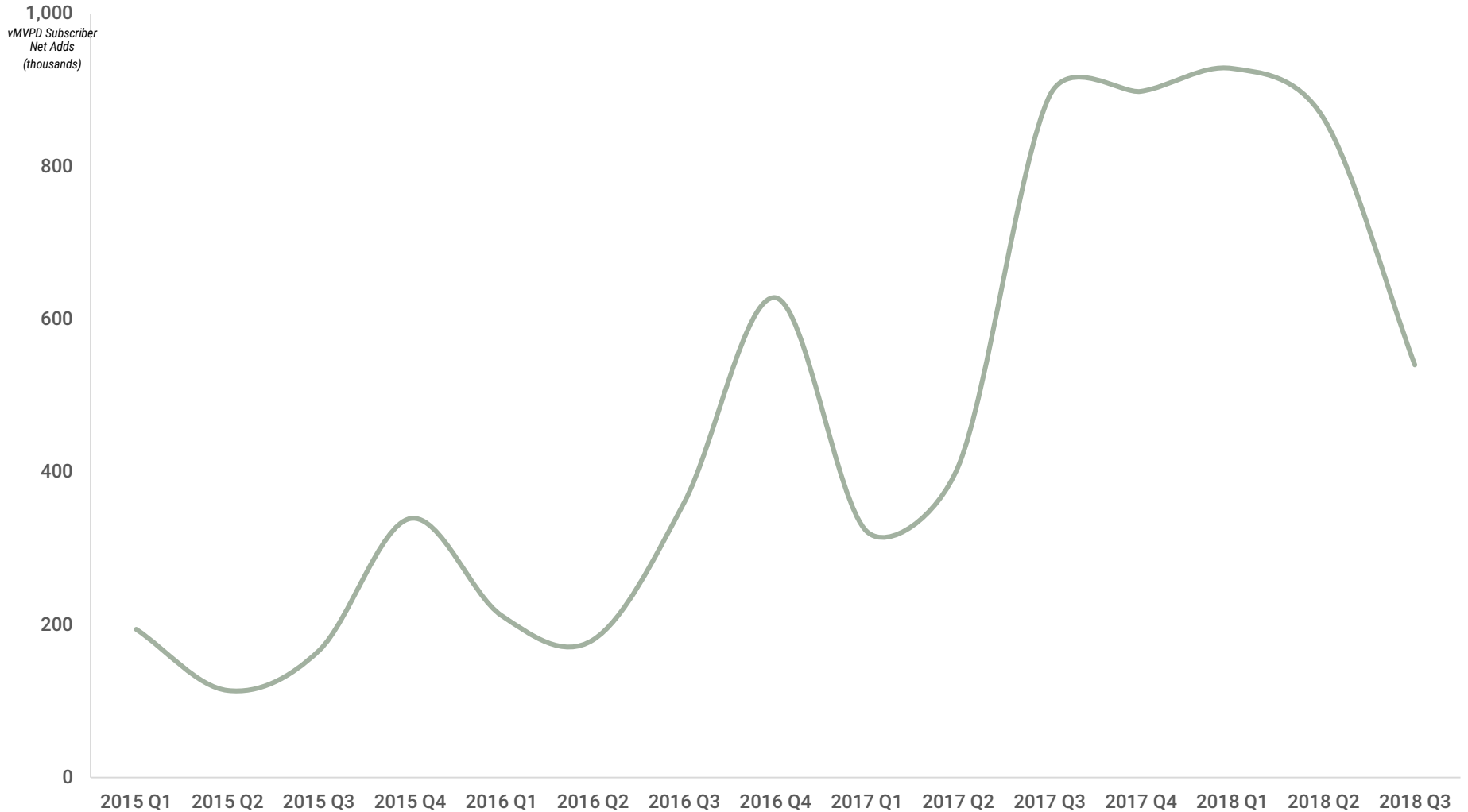
Netflix's Content Investments Have Transformed OTT Into The Primary Medium For Scripted TV Shows



Will the big tech companies continue to lure top-tier creative talents away from the linear TV ecosystem?

vMVPD

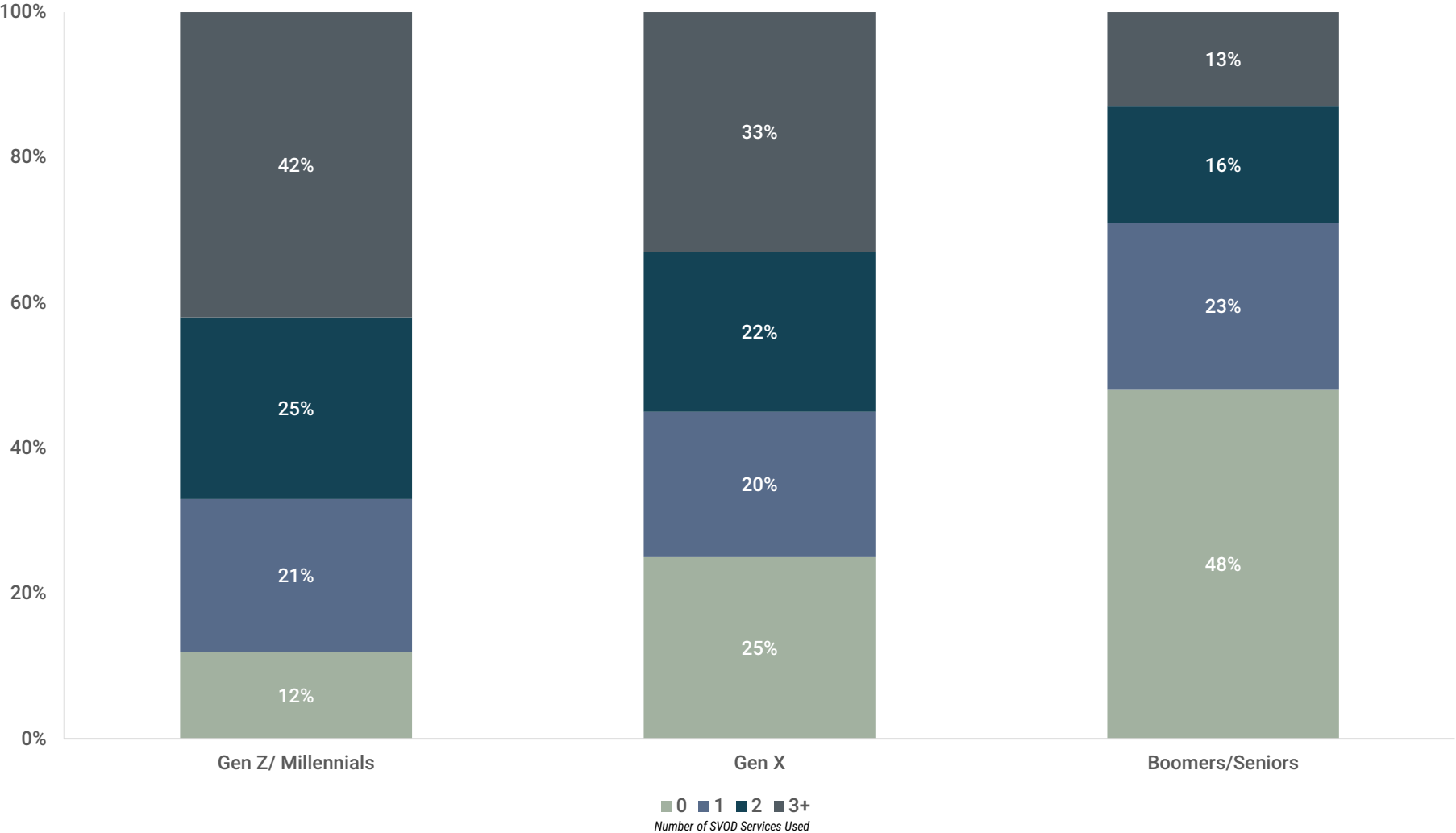
After Early Success, There Are Warning Signs That vMVPD Subscriber Growth Is Beginning To Slow Down



As new channels are added and prices rise, are skinny bundles just becoming a broadband delivered MVPD?

OTT Services

Younger Audiences Have Embraced OTT Services Where They Can Watch Content On Their Own Schedule



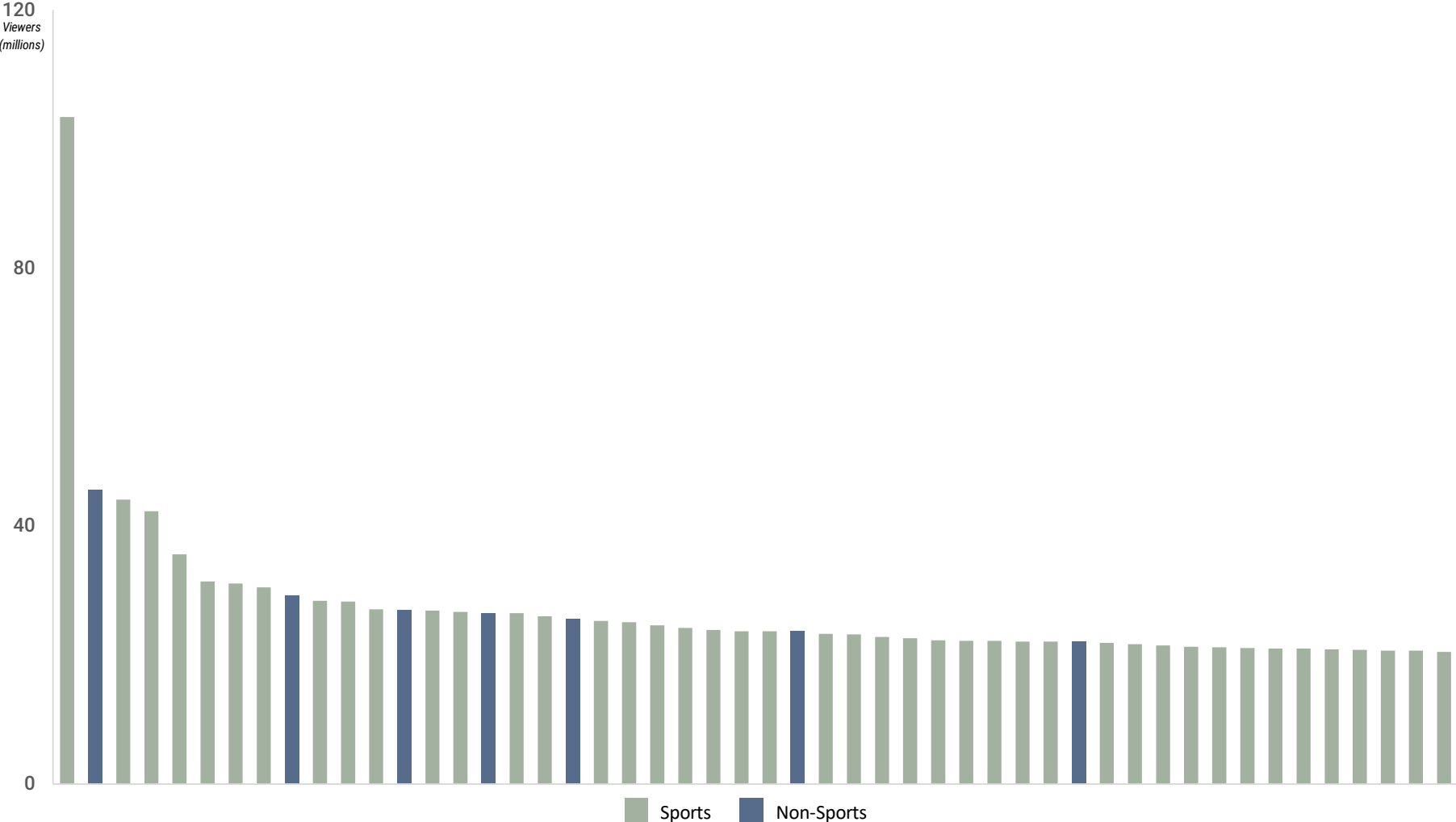
With several major OTT platforms planned to launch in 2019, how many subscriptions are customers willing to pay for?

Source: SNL Kagan; EMC Analysis
 Note: Which of the following online video subscription services do you or someone in your household currently use?



Top 50 Broadcasts

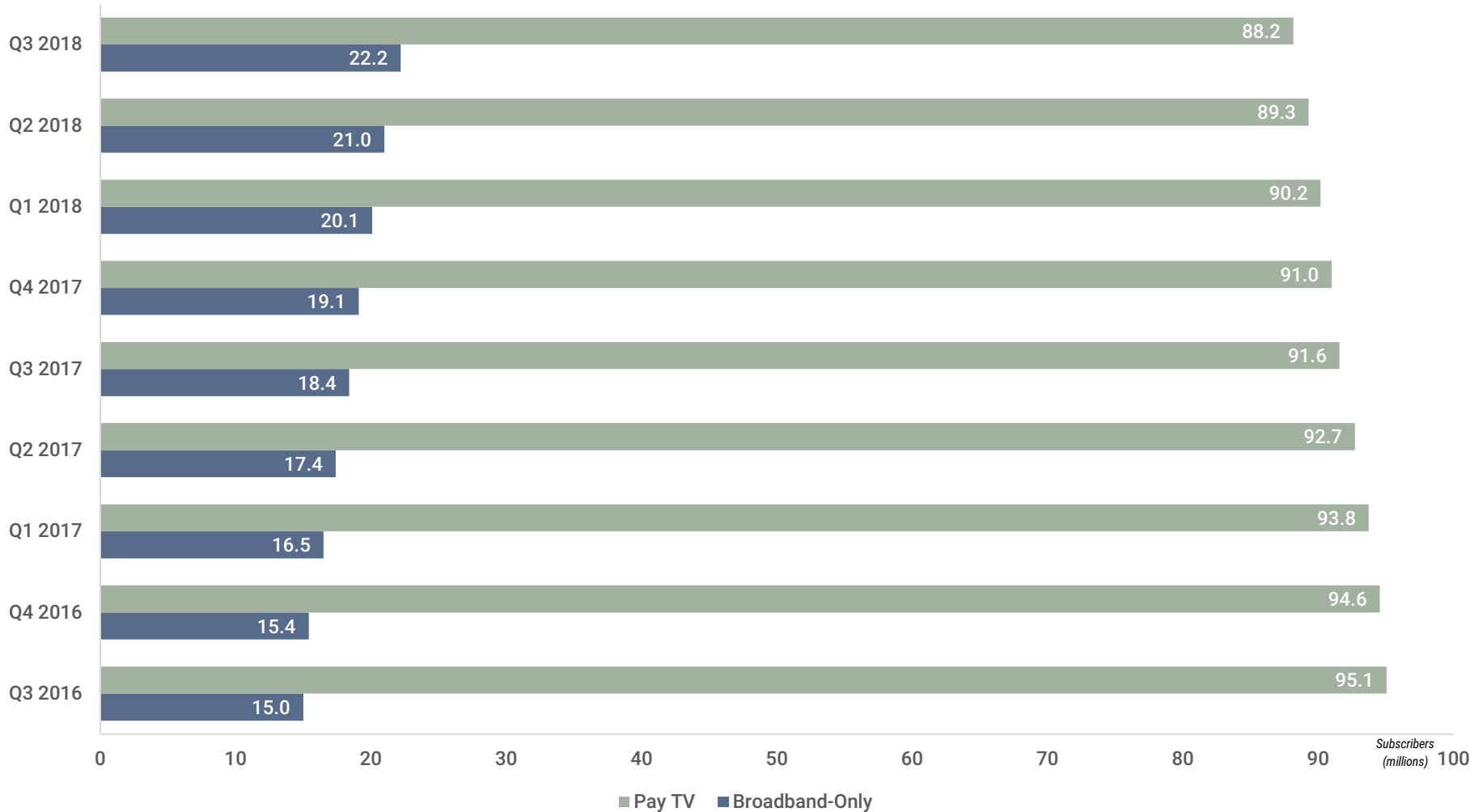
43 Of The Top 50 Broadcasts Were Sports Programming, Highlighting The Unparalleled Reach Of TV



As major sports media contracts come up for renewal, will any of the big tech companies acquire exclusive rights?

Broadband-Only

Consumers Are Slowly Leaving The Bundle And Relying Solely On Broadband For Their Entertainment Needs

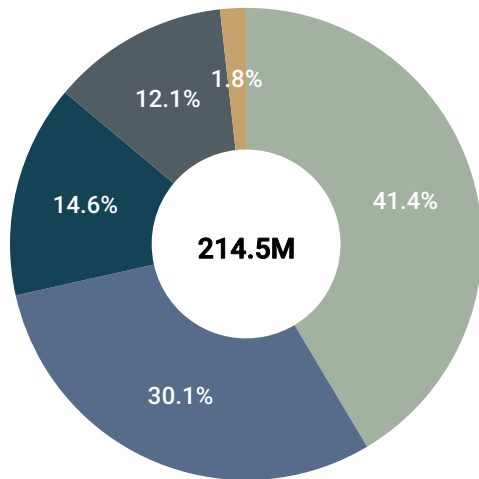


Will broadband providers implement new pricing tiers to better monetize the growing data usage from streaming video?

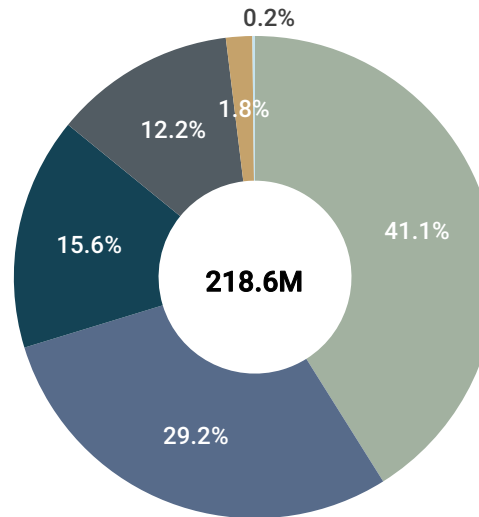
Wireless Market

The Merger Of T-Mobile And Sprint Creates A Scaled Challenger To Compete With The Market Leaders

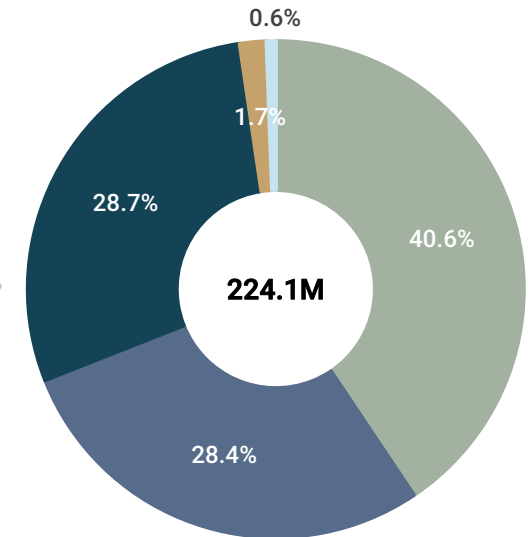
2016



2017



2018

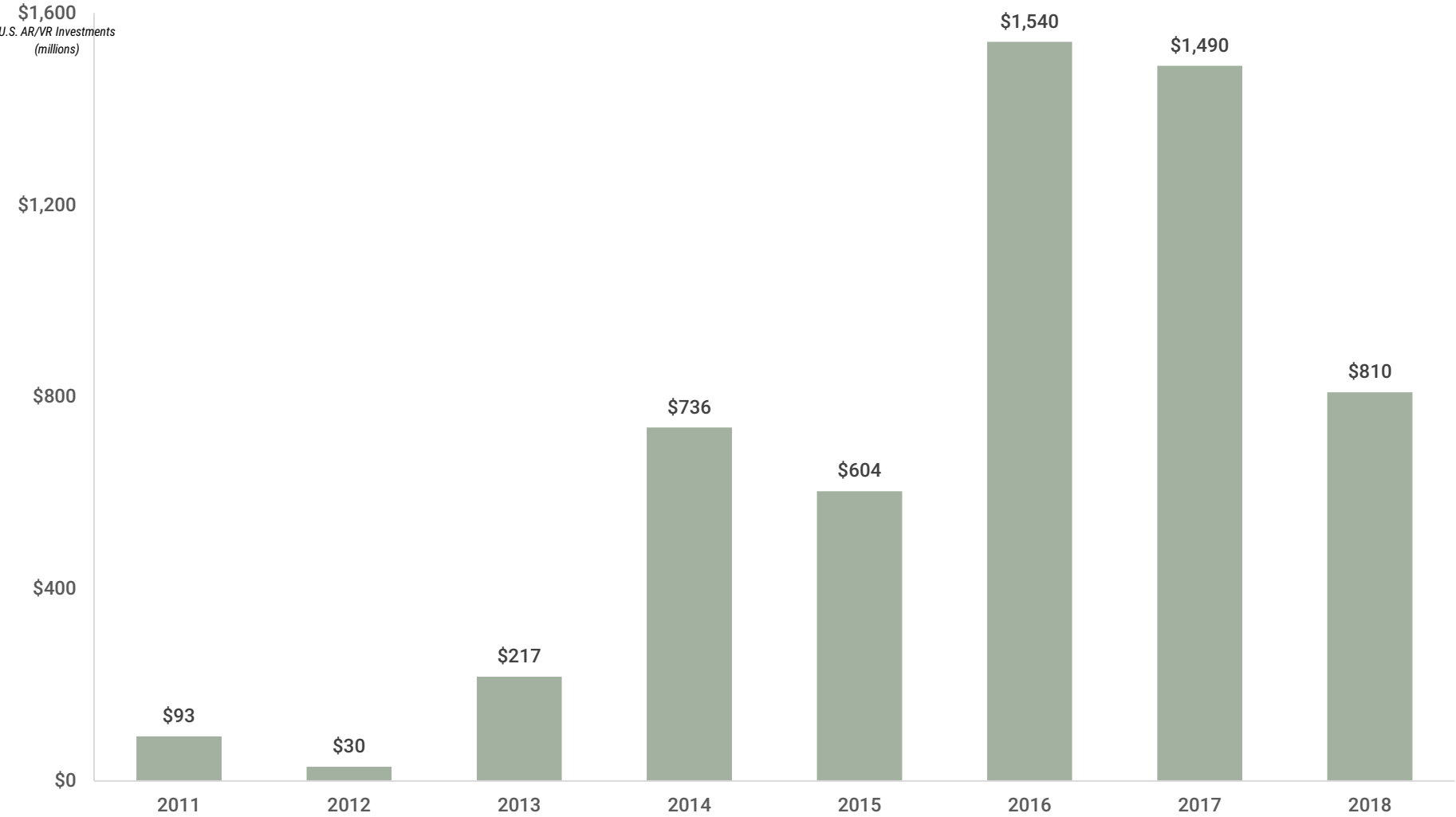


Verizon AT&T T-Mobile Sprint US Cellular Cable Companies

As fixed convergence progresses, will cable companies be able to gain market share through bundled packages?

VR Investments

Without Seeing Any Early Traction, Investors Have Dramatically Reduced Funding Into VR Companies



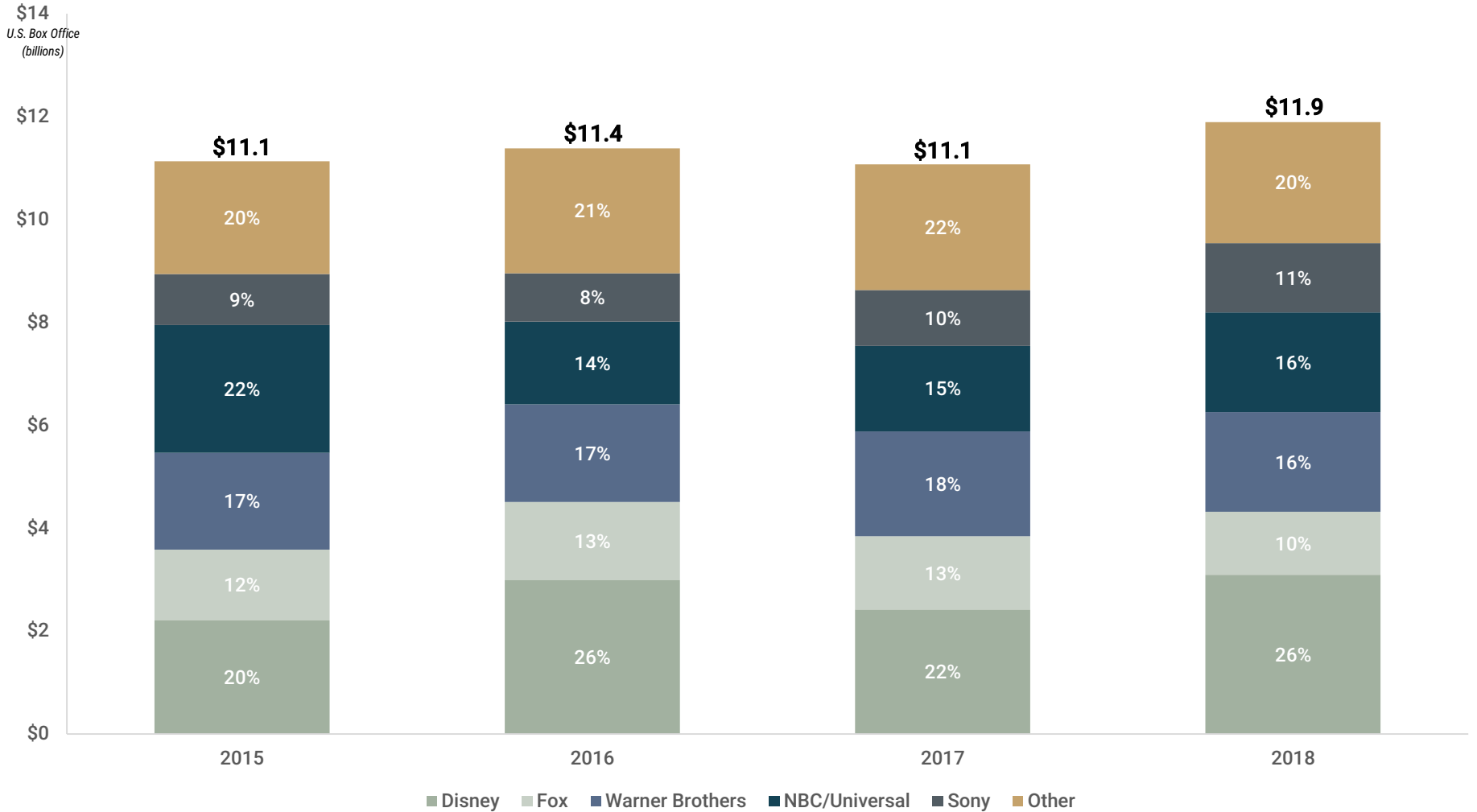
Will the rollout of 5G technology provide the necessary infrastructure for VR to gain mainstream appeal?

Source: PwC/CB Insights, IDC; EMC Analysis



Box Office

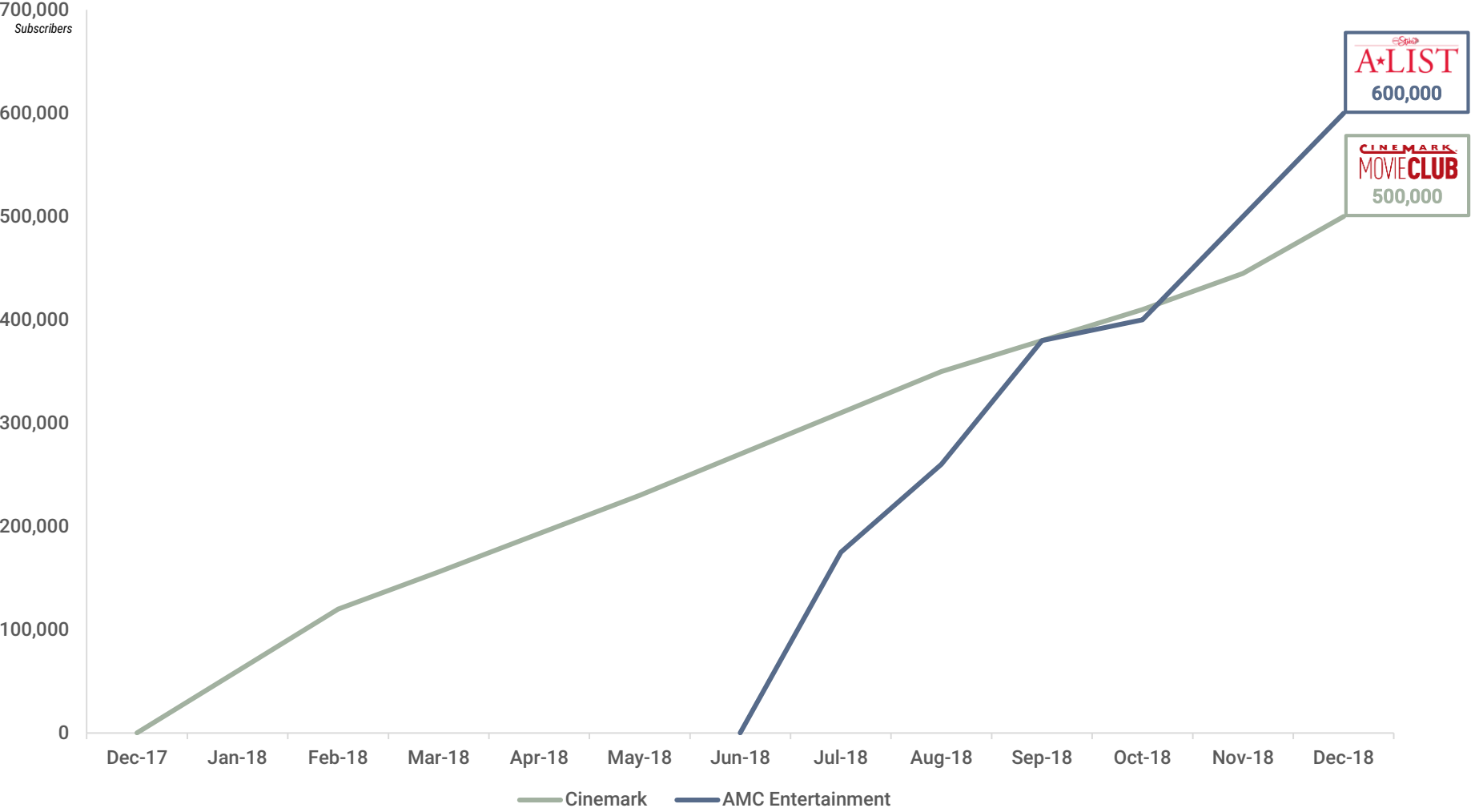
Disney's Acquisition Of 21st Century Fox Strengthens Their Position As The Premier Movie Studio



Are box-office records being driven by attendance growth, or is a secular decline being masked by rising ticket prices?

Movie Subscriptions

Exhibitors Have Avoided Unlimited Features As They Introduce Subscription Plans Focused On Profitability



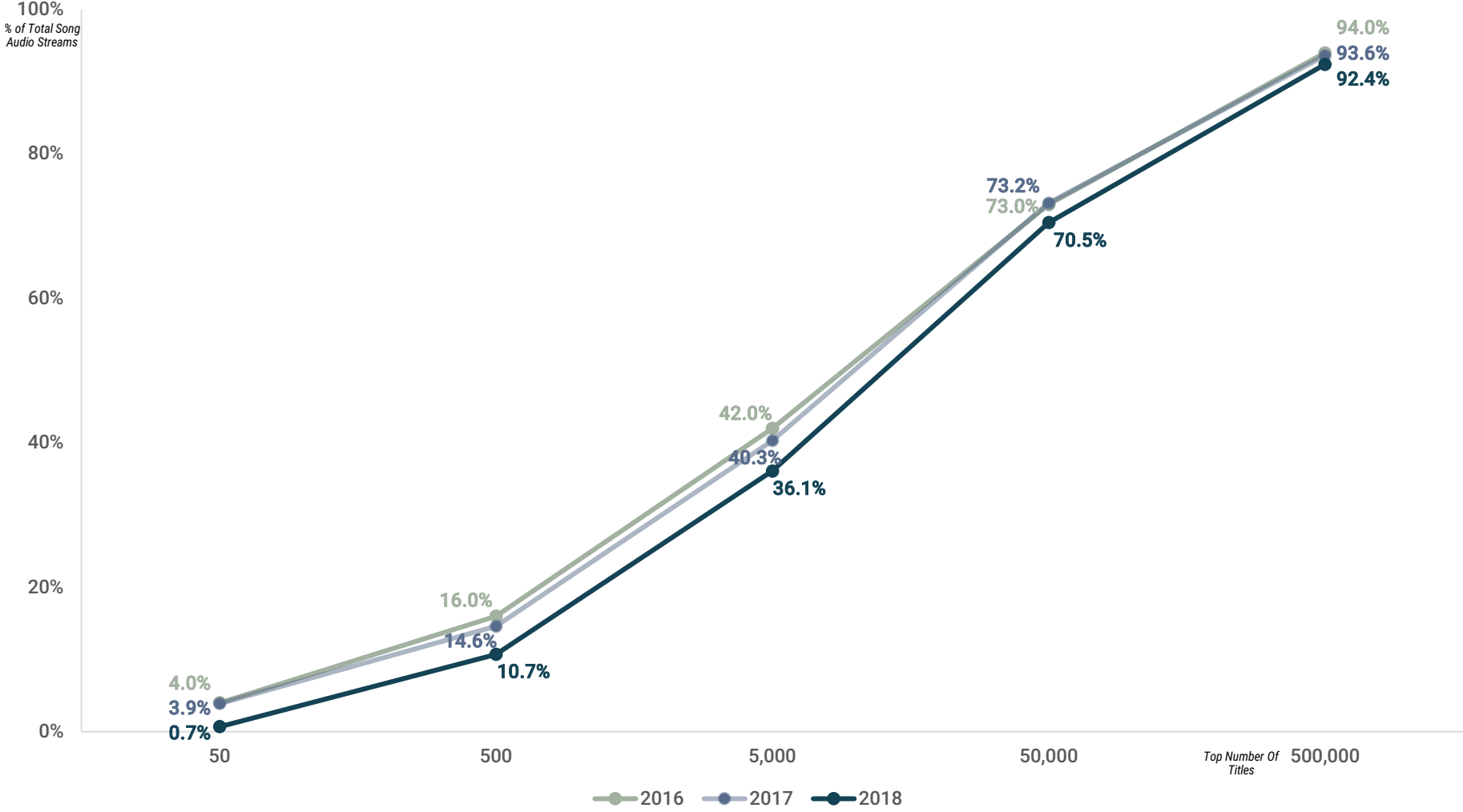
With an abundance of streaming content available at home, are tentpoles the only films worth the big screen experience?

Source: Company Reports, EMC Estimates



Music Discovery

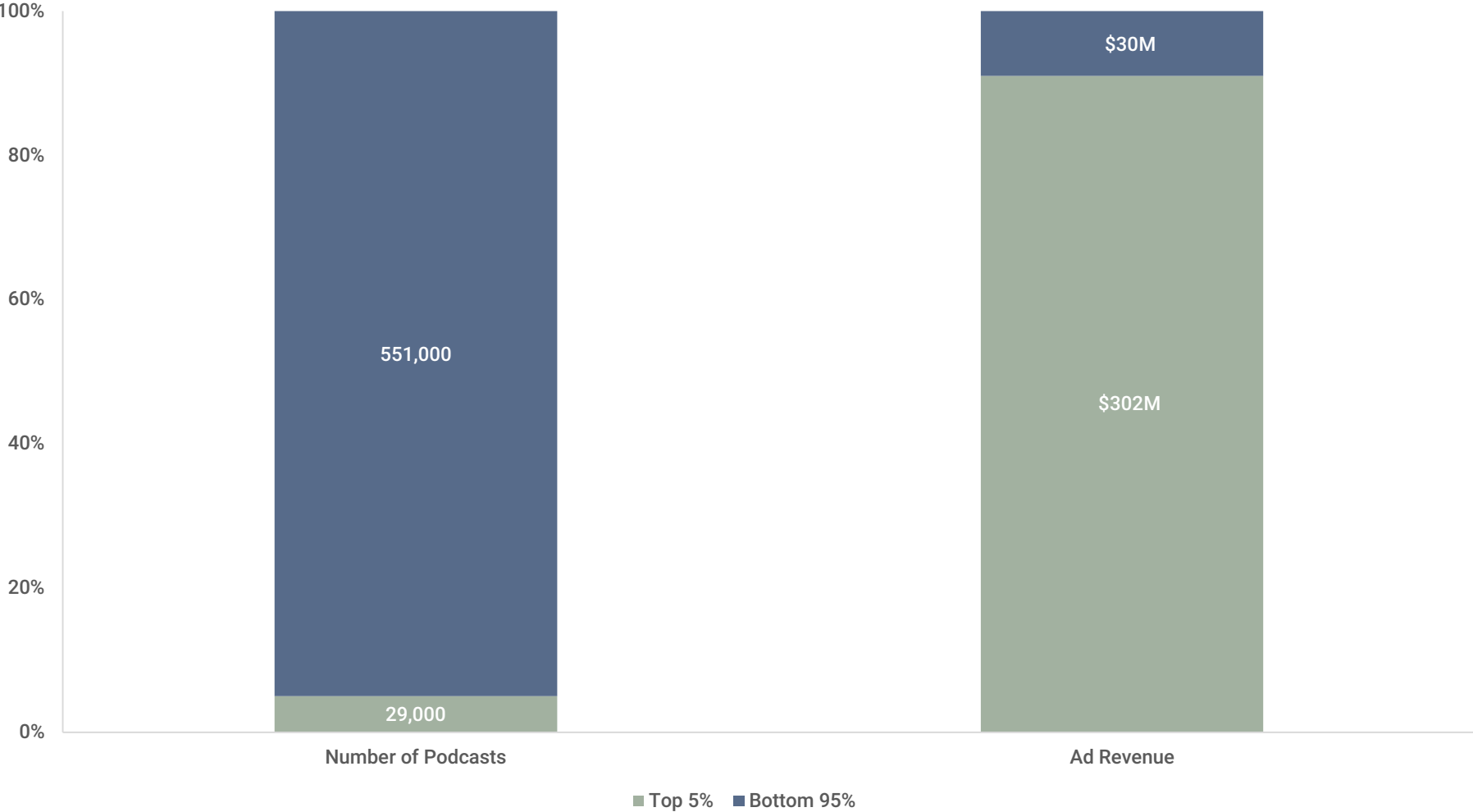
The Combination Of Access And Data Makes It Easier Than Ever For Consumers To Discover New Music



How aggressively will music services roll out direct-to-artists tools that encourage them to bypass the major labels?

Podcasts

Discovery Remains A Hurdle As The Majority Of Ad Revenue Is Derived From A Small Number Of Podcasts

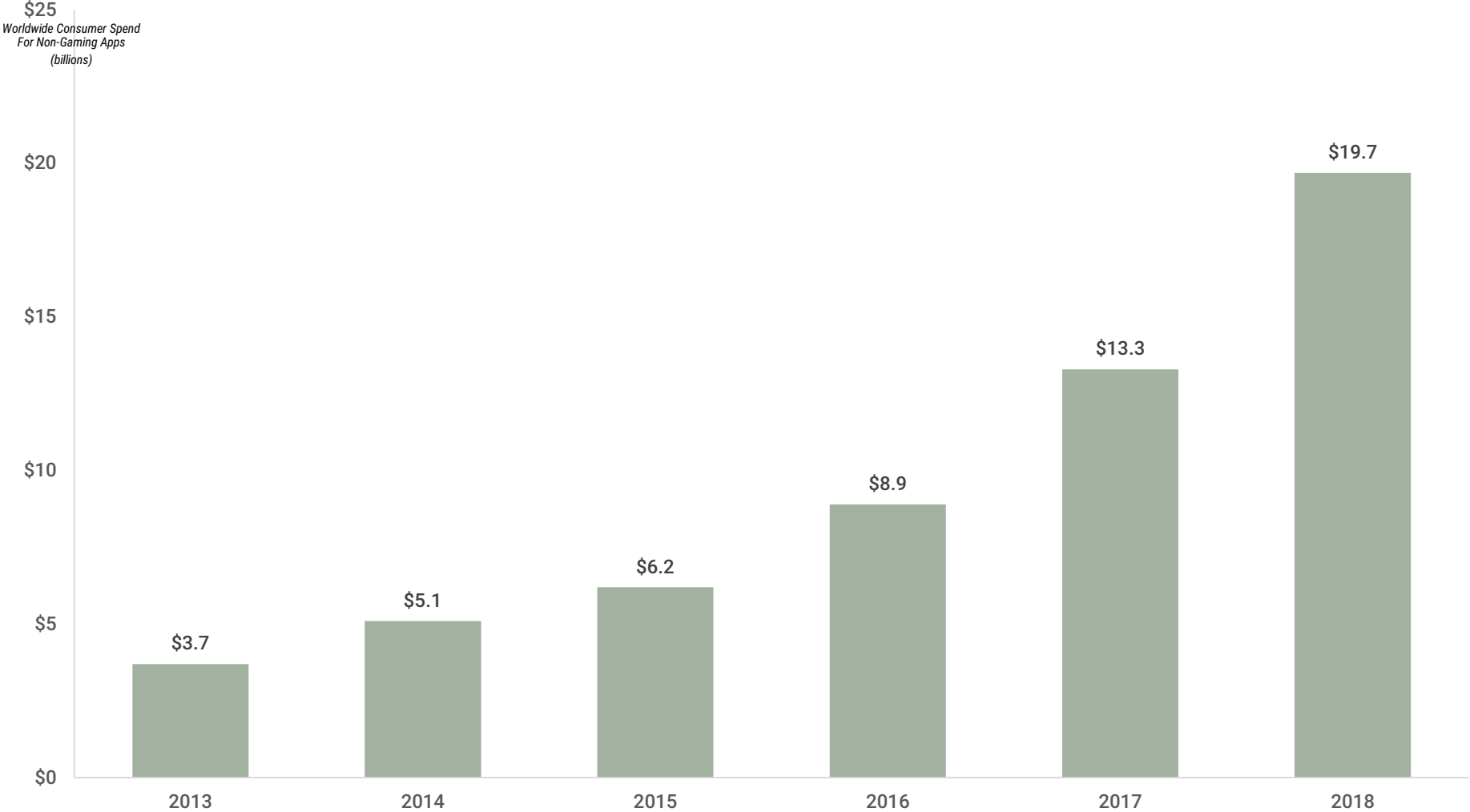


Will the advancement of programmatic audio advertising reduce the need to develop multi-platform content?



App Spending

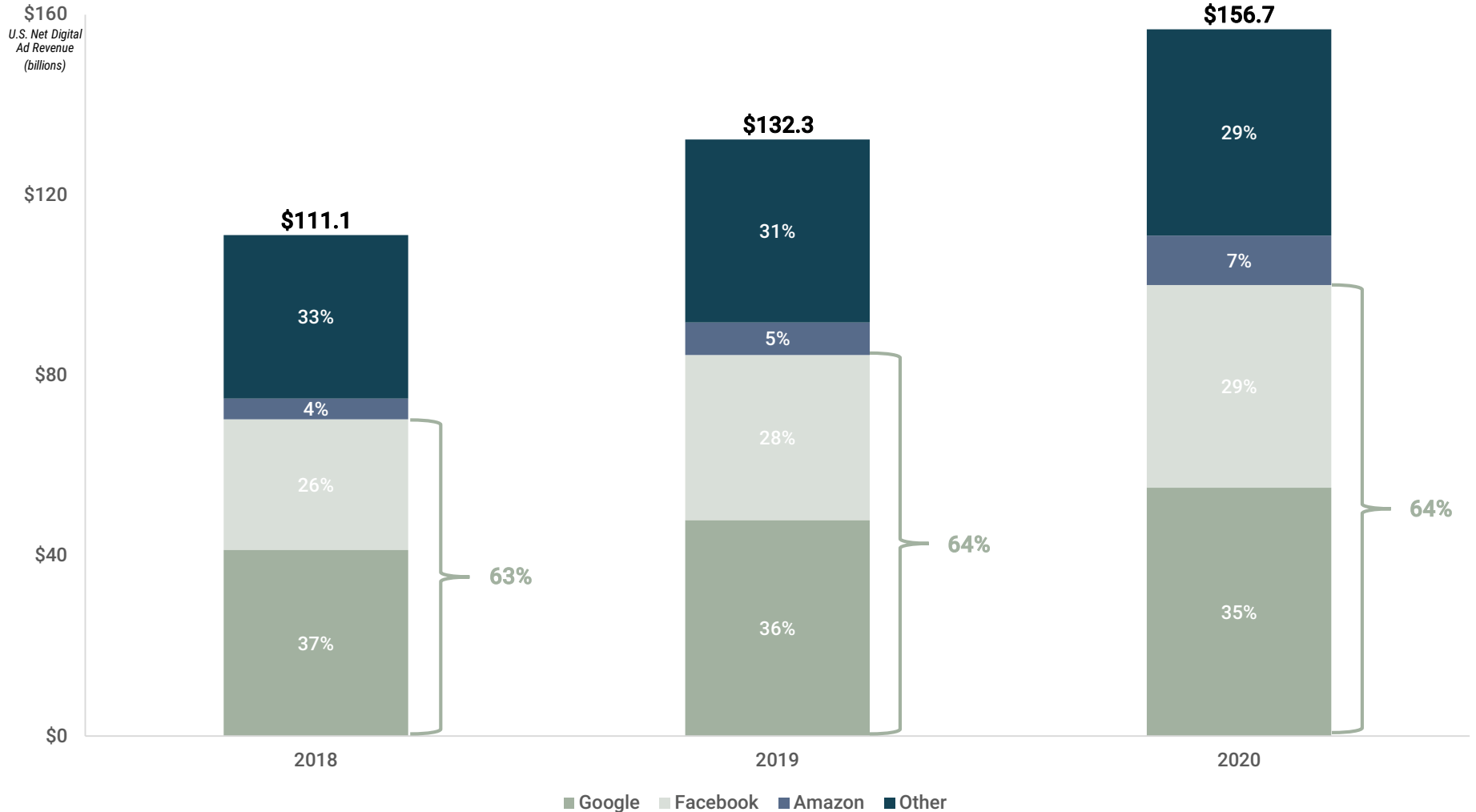
The Ubiquity Of Smartphones Makes Mobile Apps An Essential Part Of The Direct To Consumer Relationship



How many companies can bypass the app stores (and avoid sharing revenue) without diminishing its customer base?

Digital Advertising

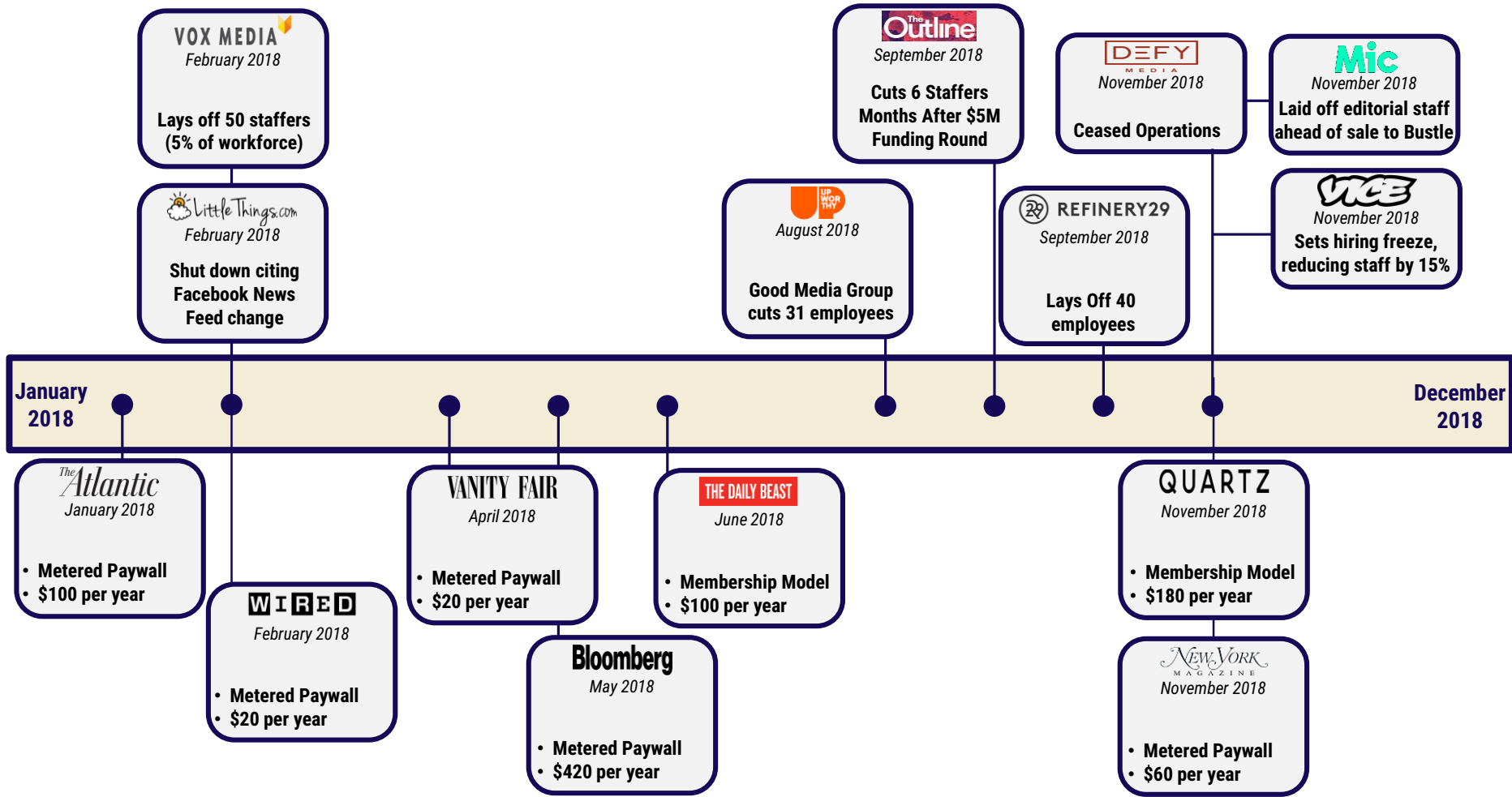
Google And Facebook Are Expected To Maintain Their Dominance In The Digital Advertising Market



Can Amazon take any market share from the duopoly or will their growth come at the expense of smaller competitors?

Digital Publishers

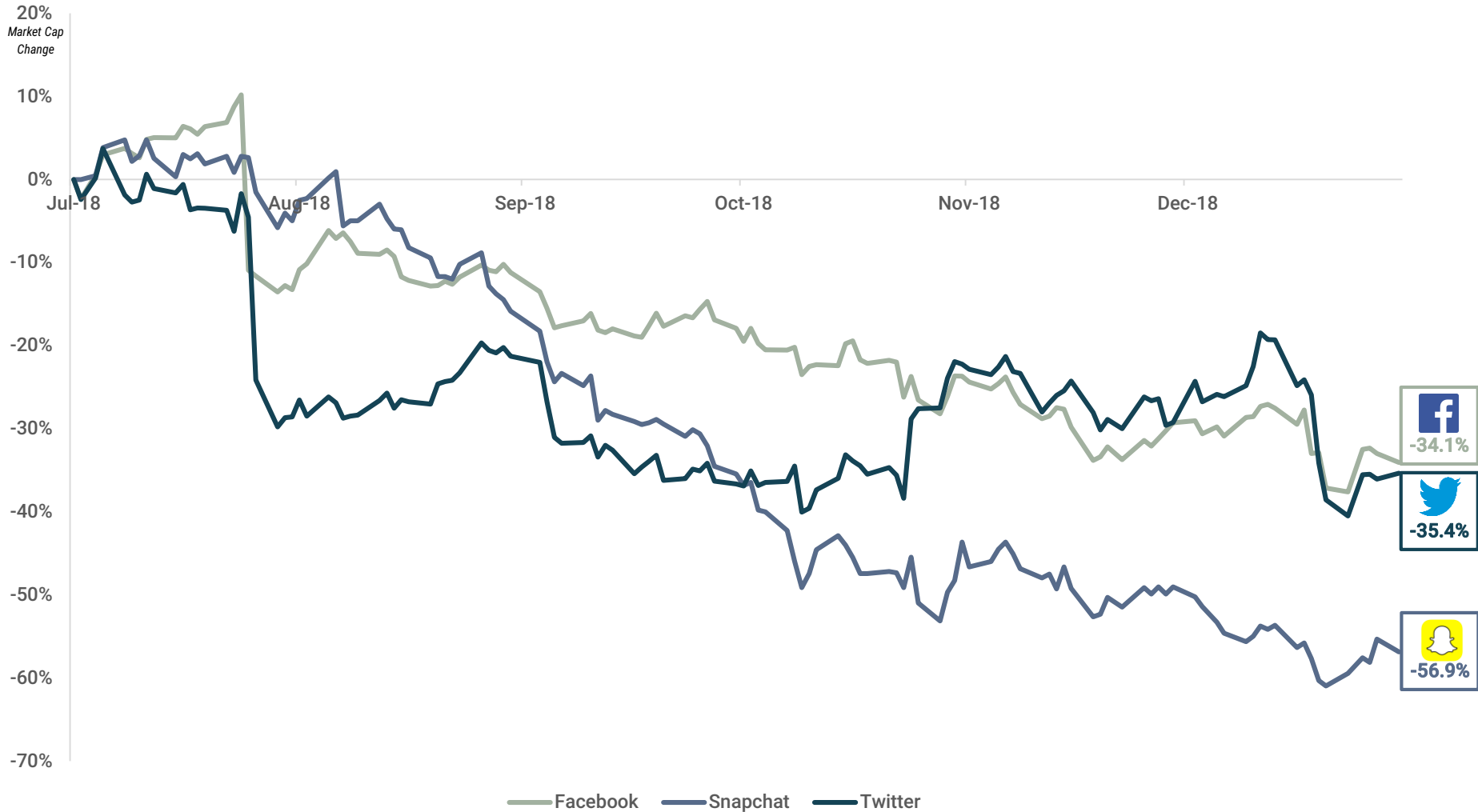
Numerous Digital Publishers Have Had To Scale Back Operations After Missing Lofty Revenue Targets



Is a subscription offering the only profitable business model for digital-first media companies?

Social Media

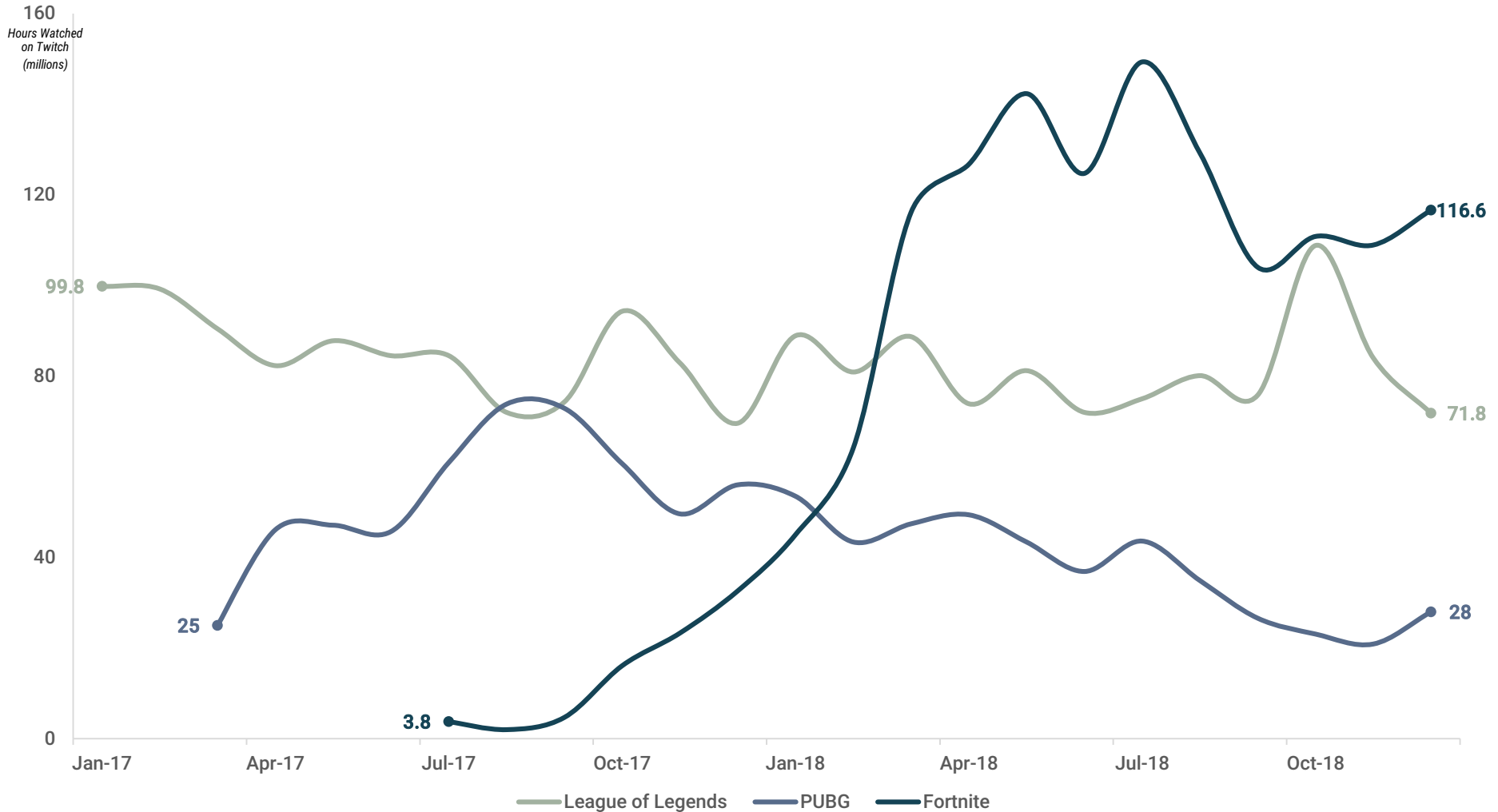
With GDPR In Effect, Social Media Companies Have Seen Their Market Cap Collapse Over The Last 6 Months



How will these platforms balance the monetization from targeted advertising and the privacy of user data?

Fortnite

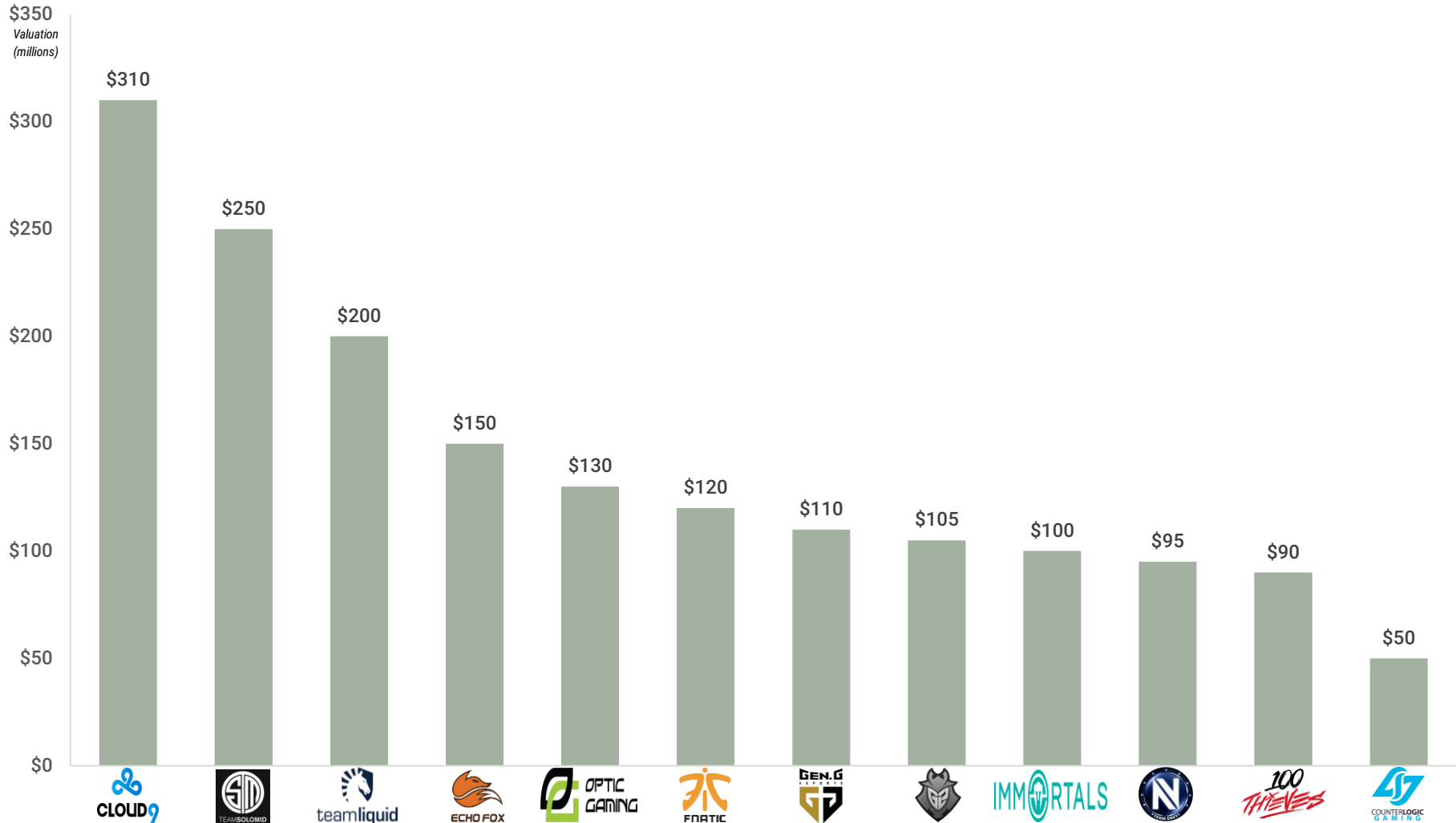
Fortnite Became A Cultural Phenomenon And Showcased The Potential Profitability Of Free-To-Play Games



With cloud gaming approaching, will there be a surge in cross platform acquisitions by the large publishers?

Esports Teams

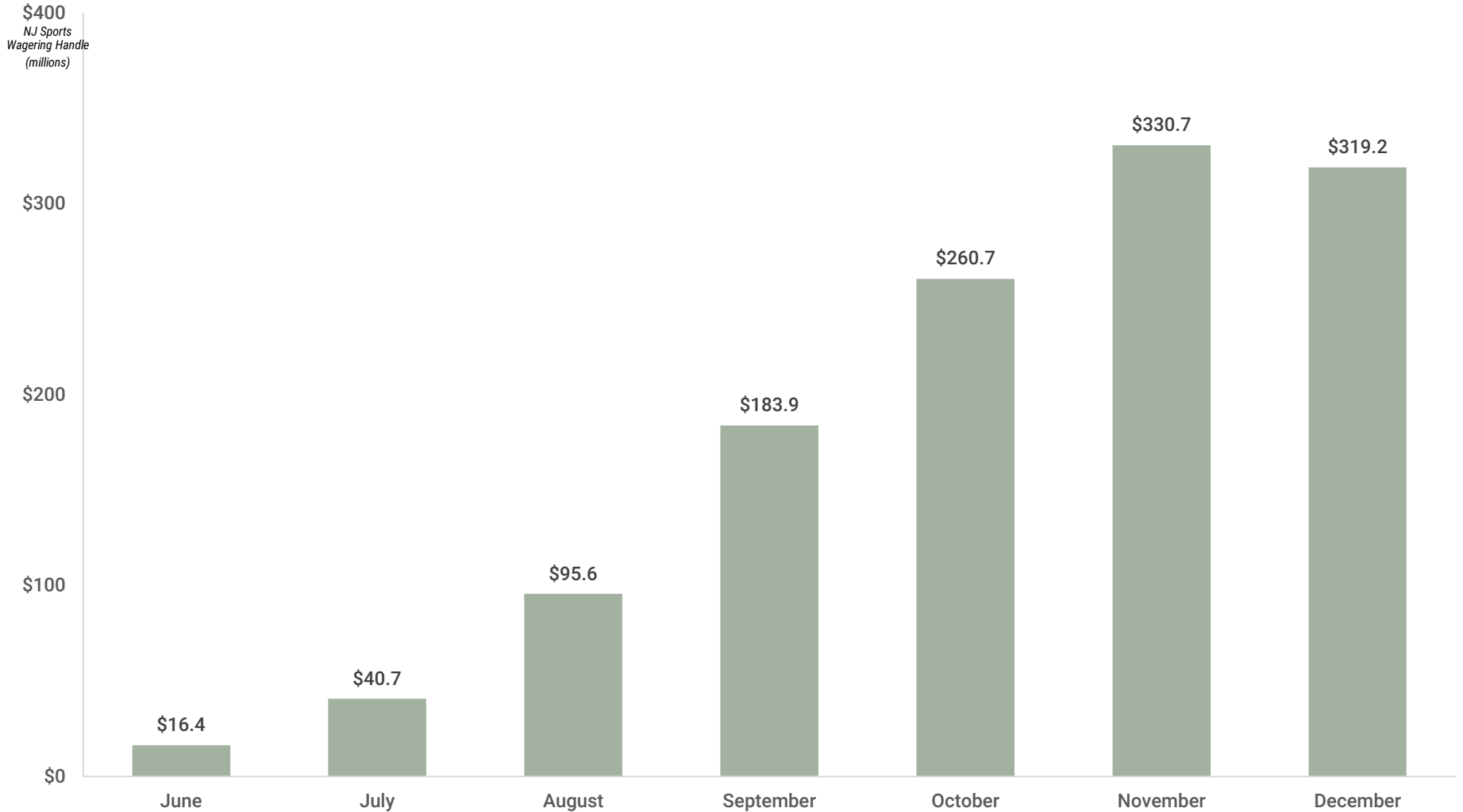
The Similarities With Traditional Sports Have Seen Heightened Demand For Ownership In Esports Teams



Can the professional sports franchising model work for all titles or will there be more experimentation in formats?

Sports Betting

There Has Been A Steady Increase In Sports Betting In New Jersey After It Was Recently Legalized



As federal legislation seems inevitable, what kinds of new businesses will emerge to capitalize on this lucrative industry?