



Broadcast Media Trends

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NAB Show 2015

Featuring
GatesAir's



Rich Redmond
Chief Product Officer

Broadcast Media Trends

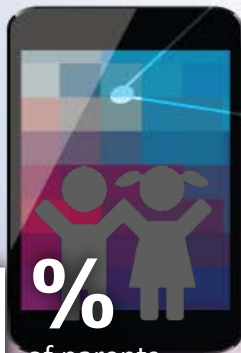
Rich Redmond



Media Consumption

4 hrs of TV are watched every day by the average viewer
up from 3hrs 42mins in 2004

41% of parents say their children use a tablet on a daily basis



56% of tablet owners watch TV with their tablet, and 60% of those do so in their bedroom



22% of people watch different content from their family on different screens while in the same room

54% of tablet owners use a catch-up service weekly to watch TV on their tablet

49% of people use smartphones or tablets to surf the web while watching TV



Source: pcpro.co.uk, November 2013



Market trends

TODAY

2018

1.06B

of TV Households

10% CAGR

1.7B

263M

of Digital TV Households

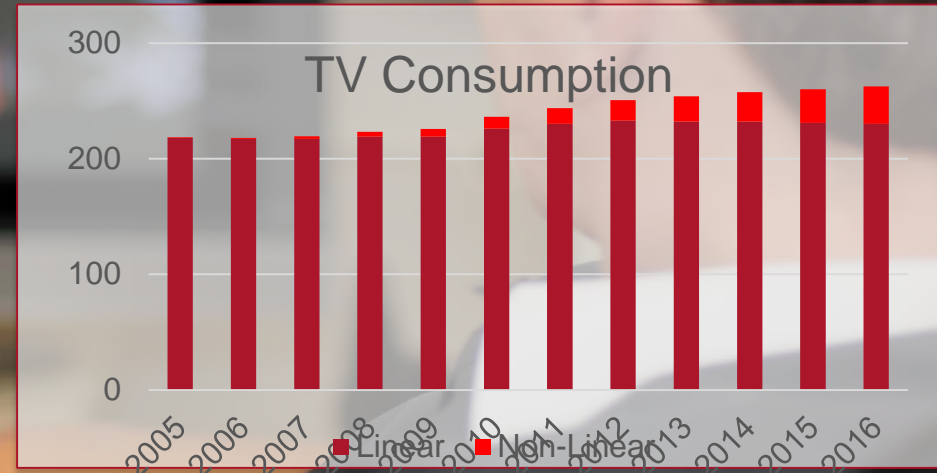
16% CAGR

553M

Linear Consumption
remains constant

>40%

Global TV market yet to
convert to digital



Market trends

Thailand to auction 4,000 licenses for digital radio

India Phase III FM over 800 new licenses

Brazil to transition AM to FM >1000 new licenses

Radio transition to digital follows TV

Norway moving to Analog Radio Shut Off

92%

Consume radio each week

10 Year Growth

AM STATIONS 4,705	-0.2%
FM COMMERCIAL 6,652	+7%
FM EDUCATIONAL 4,075	+60%
FM TRANSLATORS & LP 7,191	+60%
US Licensed Radios Station Growth	

<65%

FM Population coverage in India. #2 by population



Television Spectrum Repack



- 1st digital dividend in EU reduced broadcaster spectrum down from 862 MHz to 790 MHz.
- ITU now considering other spectrum uses for 694-790 MHz.



- The National Broadband Plan / Incentive Auction aims to recover 120 MHz more spectrum from broadcast.

Technology Evolution

Enabling innovative radio and TV wireless media delivery systems

- Help our customers accelerate return on investment, lower total cost of ownership, and ensure non-stop reliability of the network for decades.

Long Term

Mid Term

Near Term

A man in a dark suit and white shirt is walking up a set of concrete stairs. He is shown in profile, facing right. The background is a bright, slightly hazy sky. The stairs are made of large, rectangular concrete blocks.

Platform Optimization

- High Efficiency amplification
- Value Engineering
- Simplify operations
- Reduce footprint

Consolidate Capabilities

- Expand integrated IP transport capabilities
- Next Gen efficiency solutions
- Quality assurance test and measurement
- Network management control and monitoring

Advanced Delivery

- LTE Mobile Offload – convergence of LTE & broadcast
- Geo Locational targeted content insertion
- Spectral efficient network architectures – SFN
- Broadcast Site in a box – mobile cell topology changes deployment ROI



Create



Networked
Digital Radio
Studios

Transport



Contribution &
Distribution:
IP - TDM - RF

Transmit Radio



AM - FM - DAB
Analog & Digital

Transmit TV



VHF - UHF
Analog & Digital

Enable the delivery of Radio and Television content from one to many wirelessly, with the lowest total cost of ownership