

EVOLUTION OR REVOLUTION



@Dean Donaldson *Transformation strategist*

| ORANGE |

is the new **BLACK** |



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Intelligence. Strategy. Transformation.

ORANGE
is
the
new **BLACK**





“teləˌviZHən” : A piece of electrical equipment with a screen on which you can watch programs with

moving pictures and sounds

Oxford Dictionary







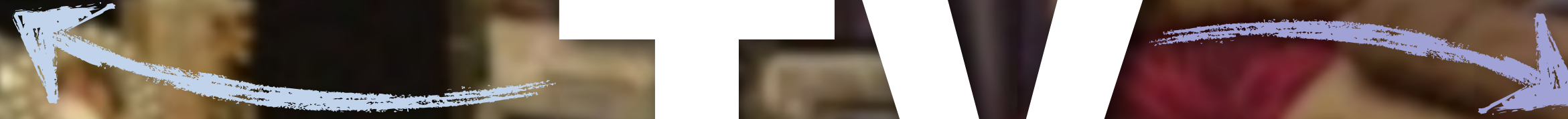


RESET

poster

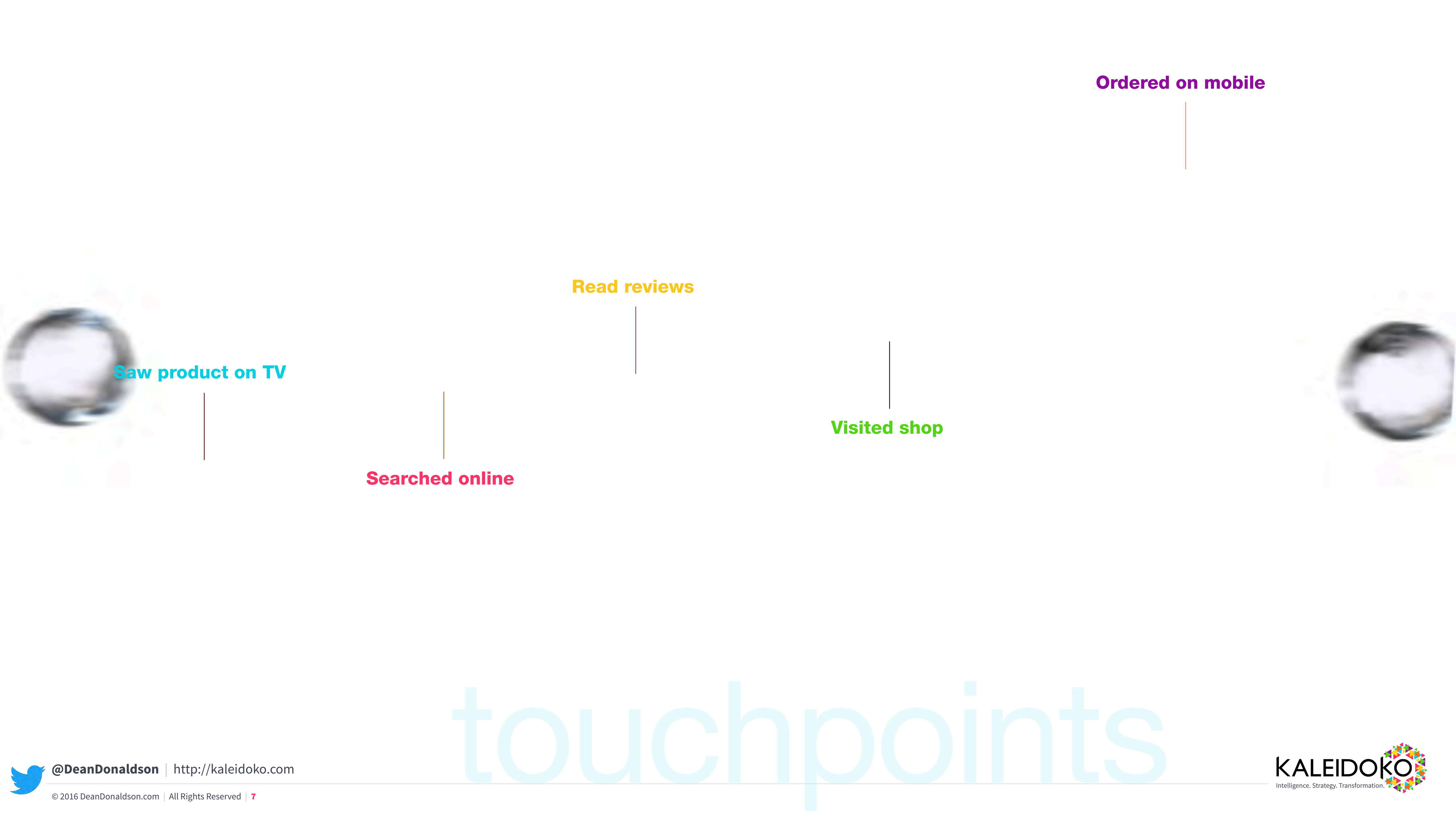


TV





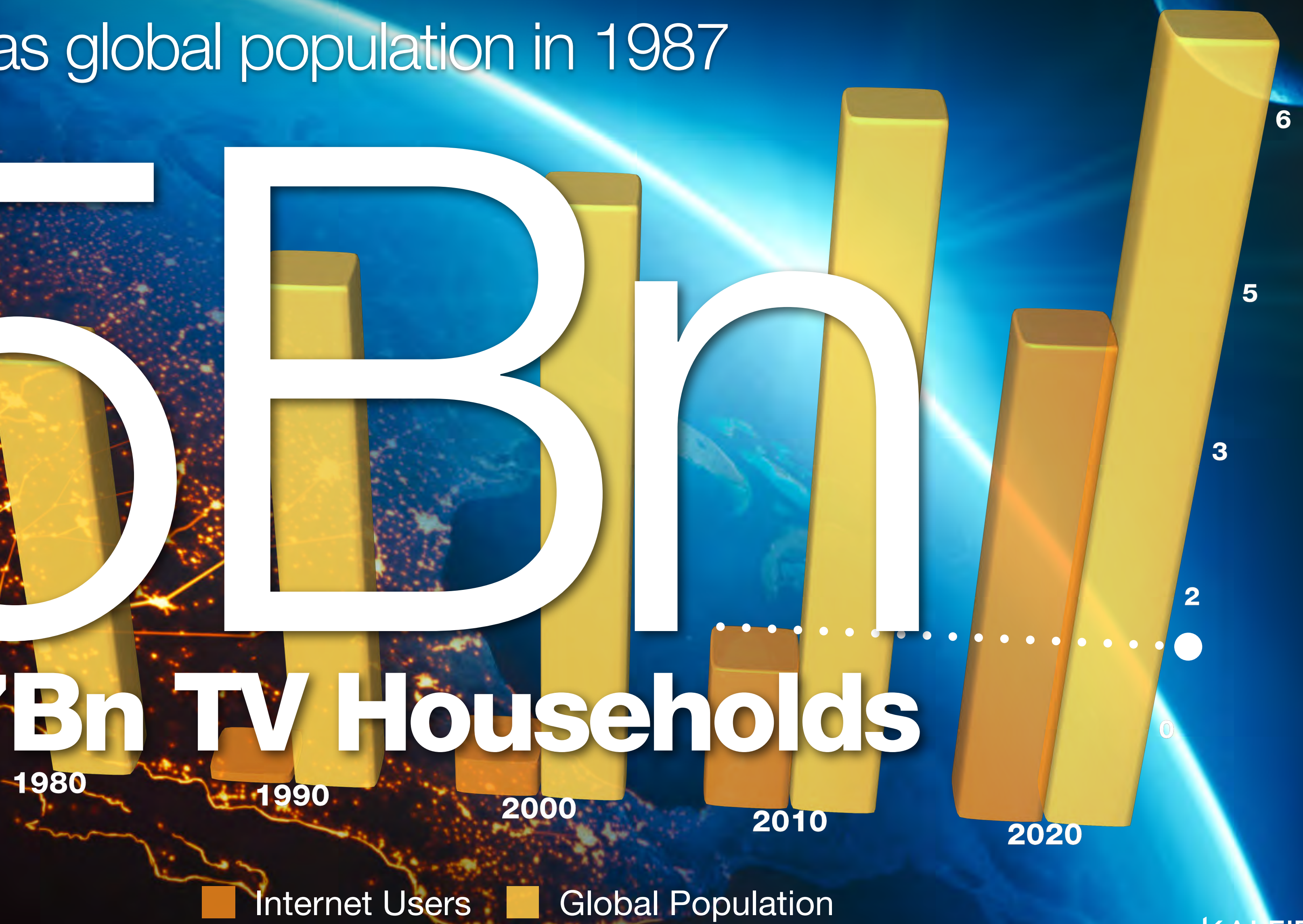




Global Internet Users

2020 users same as global population in 1987

5Bn
1.7Bn TV Households



In 2020

82%

of all Internet traffic will be video



In 2020

70%

of all Mobile traffic will be video



In 2020

5 million years

**worth of video will be transmitted
online every month in 2020.**



65x
Faster than 4G

5G
1Tbps





“ At 1Tbps we’ll download a file **100 times**
the size of a HD feature film in about
three seconds. ”



Screens are Getting Bigger

110"
World's Largest
UHD LED TV

4K

Ultra High Definition (UHD)



Driven by Sport

4K



2016

Trials starting

8K

SUPER Hi-VISION

2018

Broadcasting



Human Resolution



4K

8 MegaPixel = Photo (Blinking)



Human Resolution

32K

530 MegaPixel = Motion (Full Vision)



Human Resolution

TRUE 20:20 (Tele)Vision

8K

33MegaPixel for normal distance
TV viewing



Most Hi-Def Event!



TOKYO ● 2020



ULTRA HD



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2020 Vision



AmbiLight



Antumbra Glow



Wallpaper TV

205”



Wafer-thin Speakers



The TV

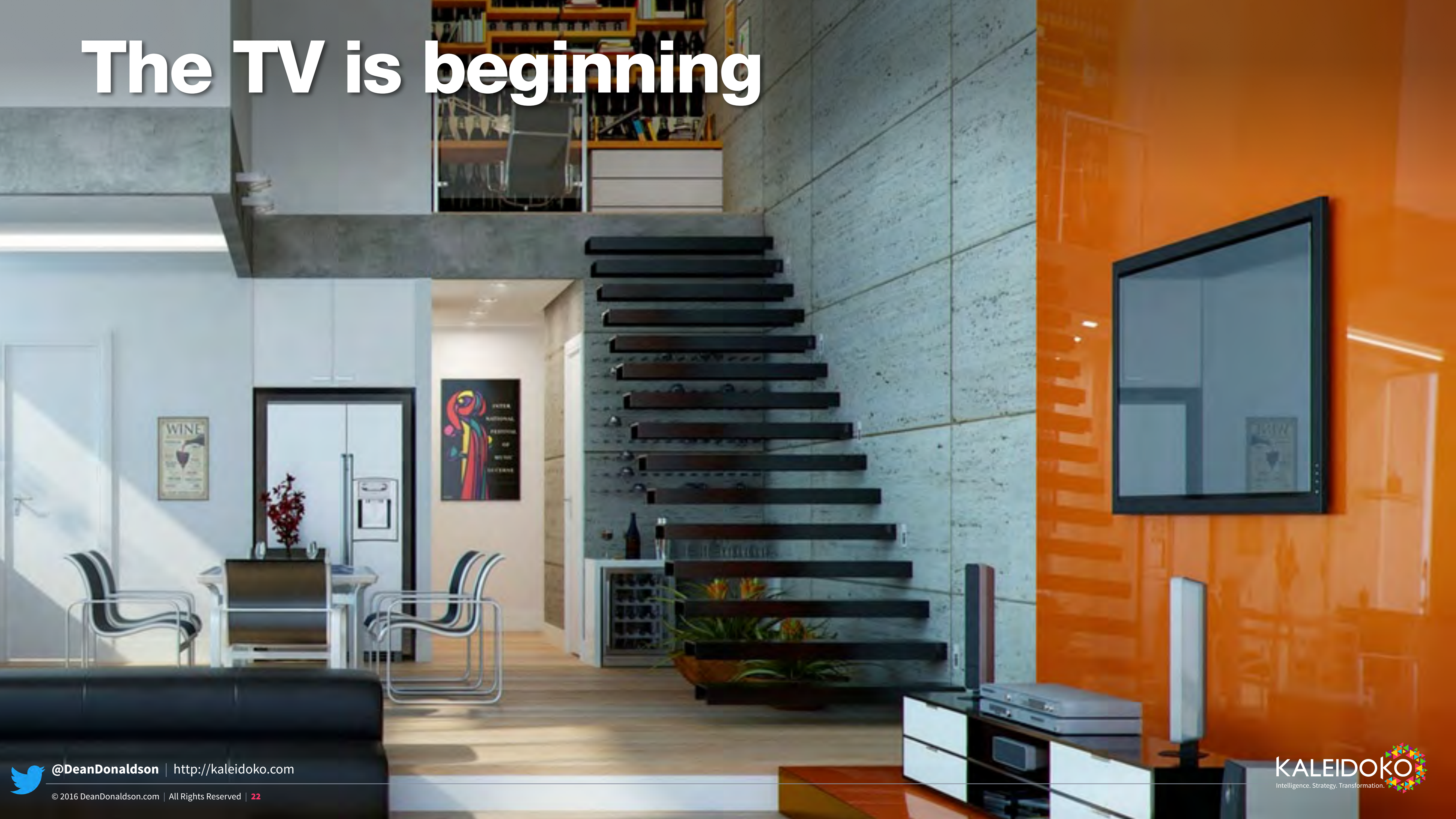


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The TV is beginning



The TV is beginning to completely



The TV is beginning to completely disappear



Transparent Walls



3D Glass Wall



 **PrimeSense™**
Natural Interaction®





Visual Navigation





do you 'mind'?

Immersive screens

Controlled by thought alone

Search

Business solutions
- money transfer
- net banking
- strategic planning
- statistics
- video conferencing
- e-mail, ftp
- database working

7

Entertainment
- films
- music
- games
- e-books
- chats

5

Internet
- websites
- hosting
- banners
- searching sys
- blogs
- chats
- applications

Combining eye-tracking with
a brain sensor interface that
enables complete hands-free
texting – an early form of
telepathy



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Virtual Reality

Project Morpheus



PS5

SONY

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Glasses Free 3D



Mobile Projection



Holographic Projections

“ Use a CD jewel case cut 4 of 1xm x 3.5cm x 6cm and tape edges. Search YouTube for **holograms** ”



Towards 3D Holographic TV

Creating the “illusion”

“Overlaying screen with mesh
allows multi viewing angles
of television in 3D without
glasses”









Dean Donaldson

Edit Profile



Dean Donaldson
Put channel 4 on now!!

Like · Comment · 15 August at 14:17 via Mobile

Tim Lightfoot thats me on the way to work...
15 August at 14:20 · Like

Jan Nymark Olsen Yeah yeah. Don't shout, you woke me up!!!!
15 August at 14:23 · Like

People you may know See all



100M
Hours video a Day

- Wall
- Info
- Photos (270)
- Friends

Friends (532)

- Kimberly Waichulis Eyblaster
- Melissa MacKinnon Bowden
- Dana Miller
- Angie Alexander
- John Haake
- Sonya Gelman



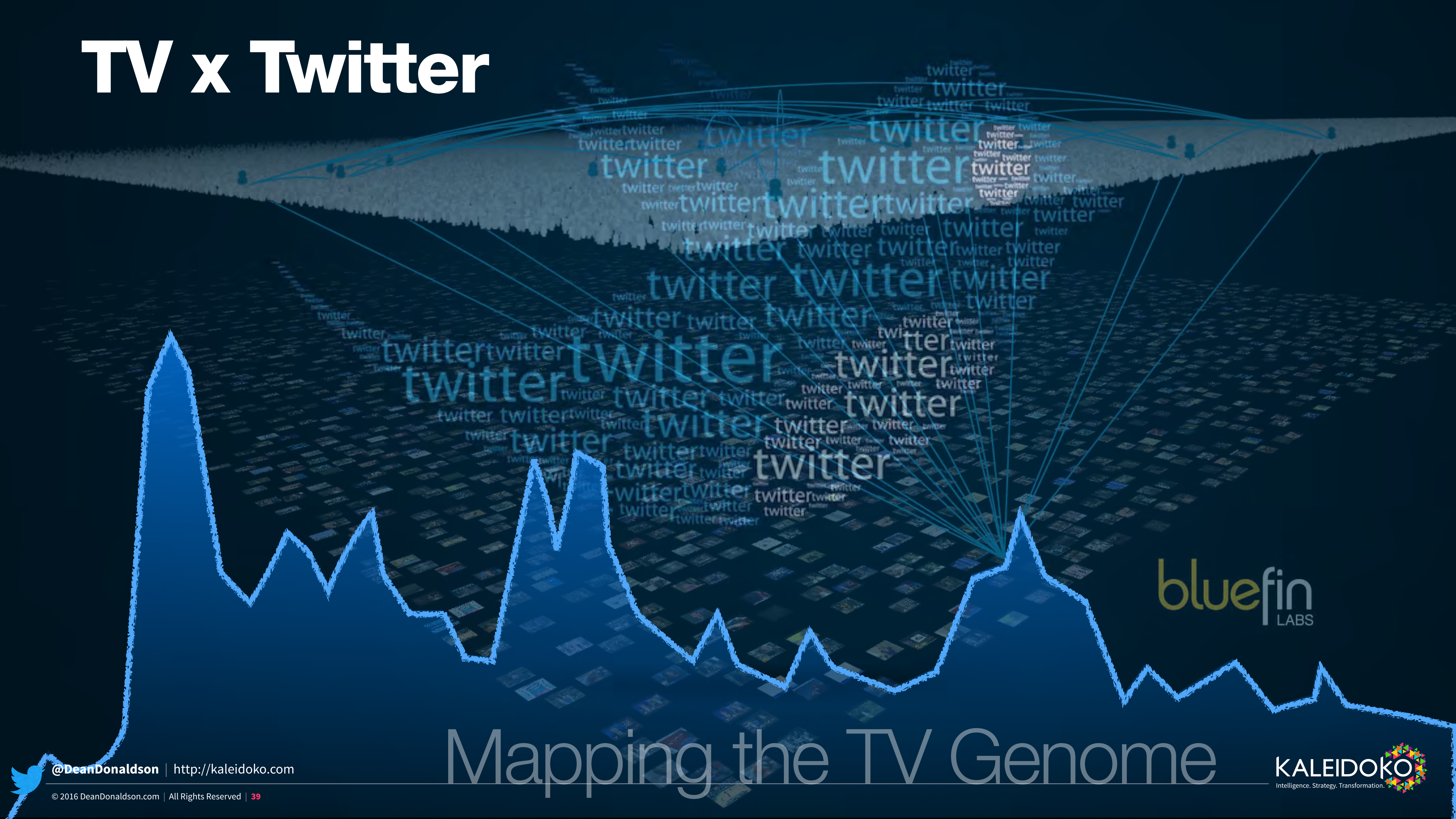
Unlike · Comment · Share · 15 August at 14:36 ·

New Frank Kern Webinar
webinar-registrations.net



Frank Kern and Kevin Nations reveal how to triple your prices and have your customers love you for it.

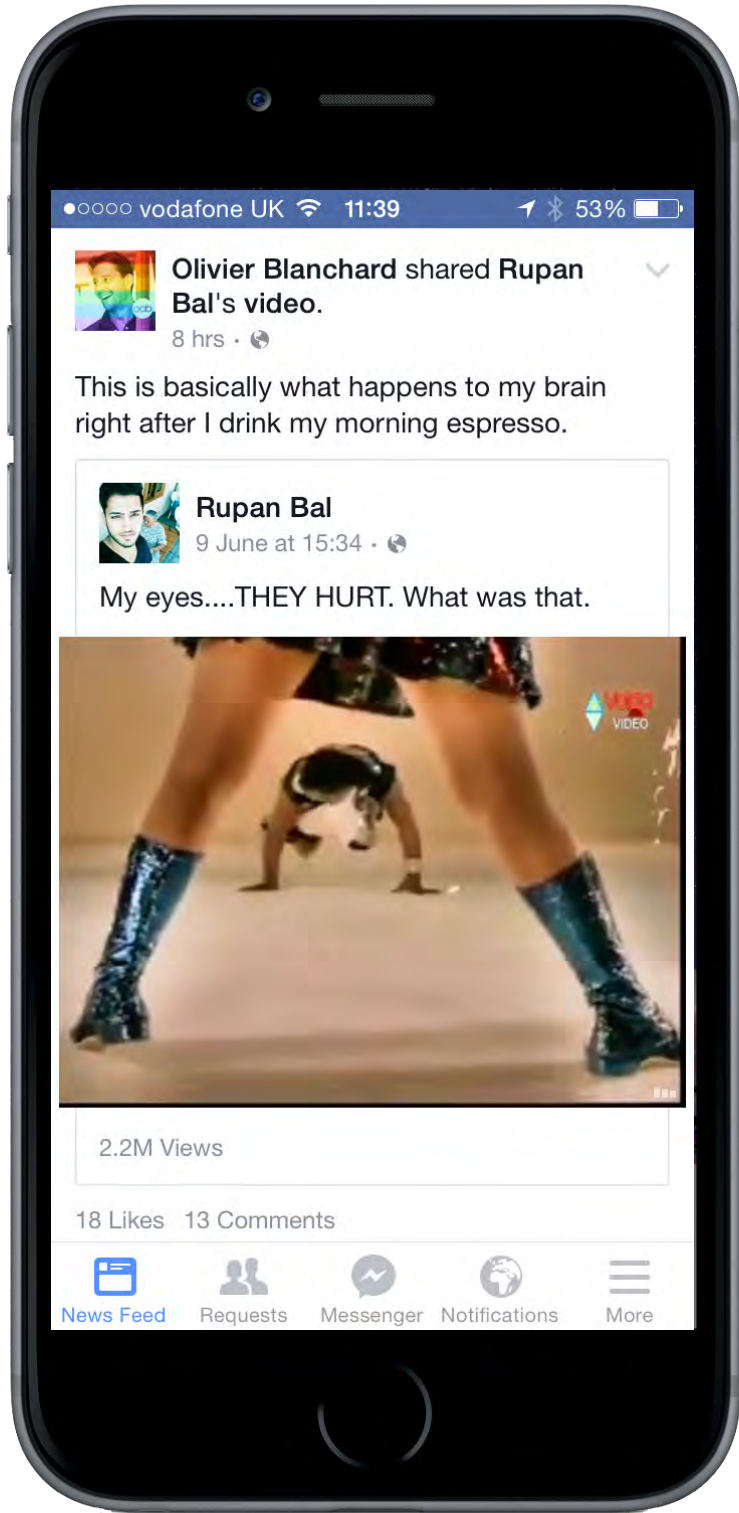
TV x Twitter



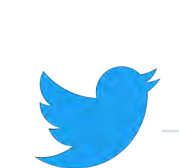
bluefin
LABS

Mapping the TV Genome

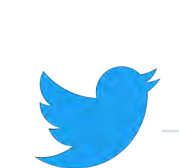
Beyond Online



Facebook TV



Facebook TV



In Car



On Fridge

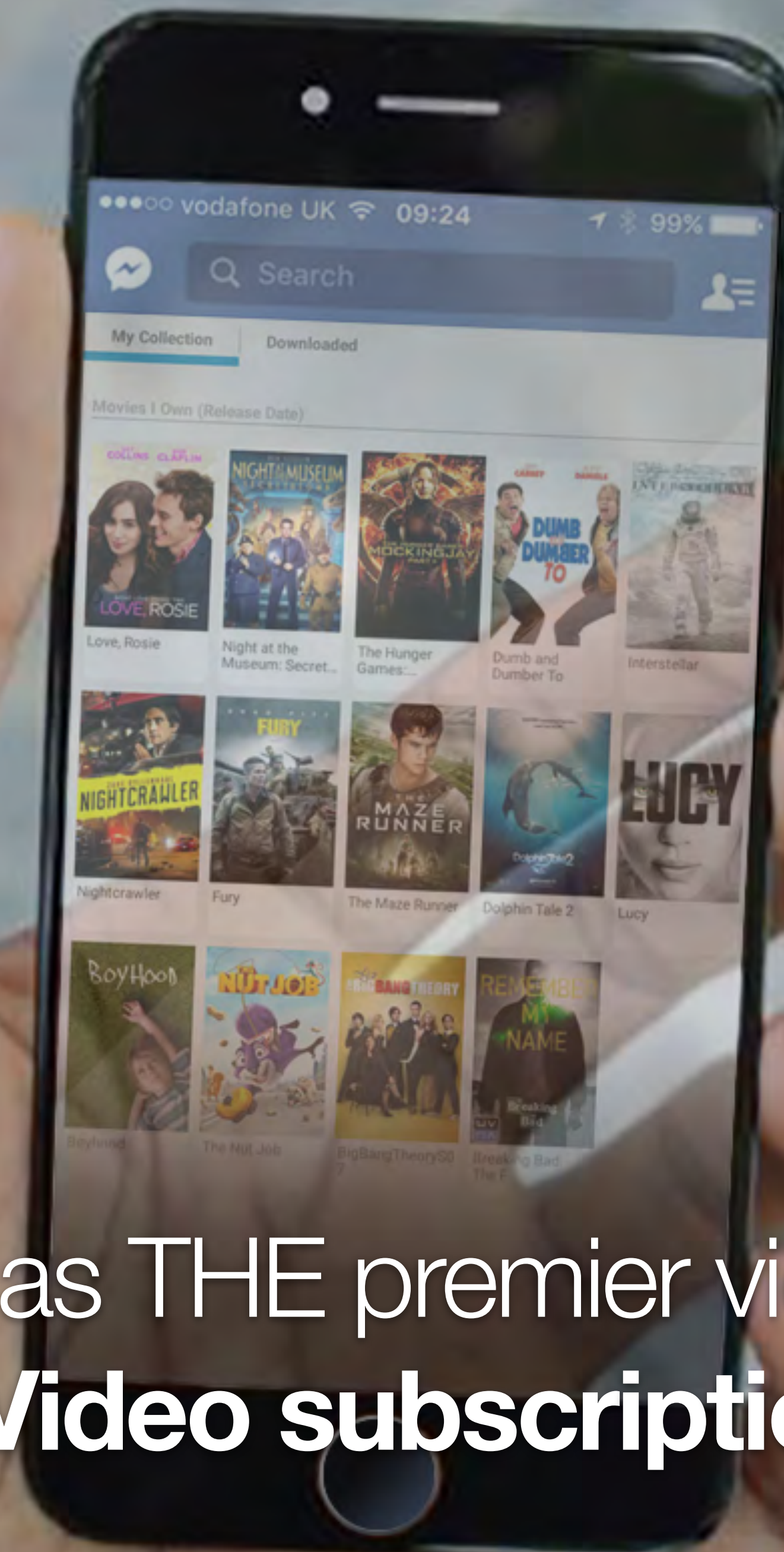


On Fridge

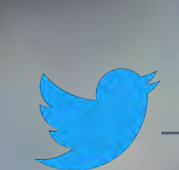


2020: iPhone 8S

Transparent mobiles here



Facebook replaces YouTube as THE premier video destination
and launches Long Form Video subscription offering...



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Facebook 360

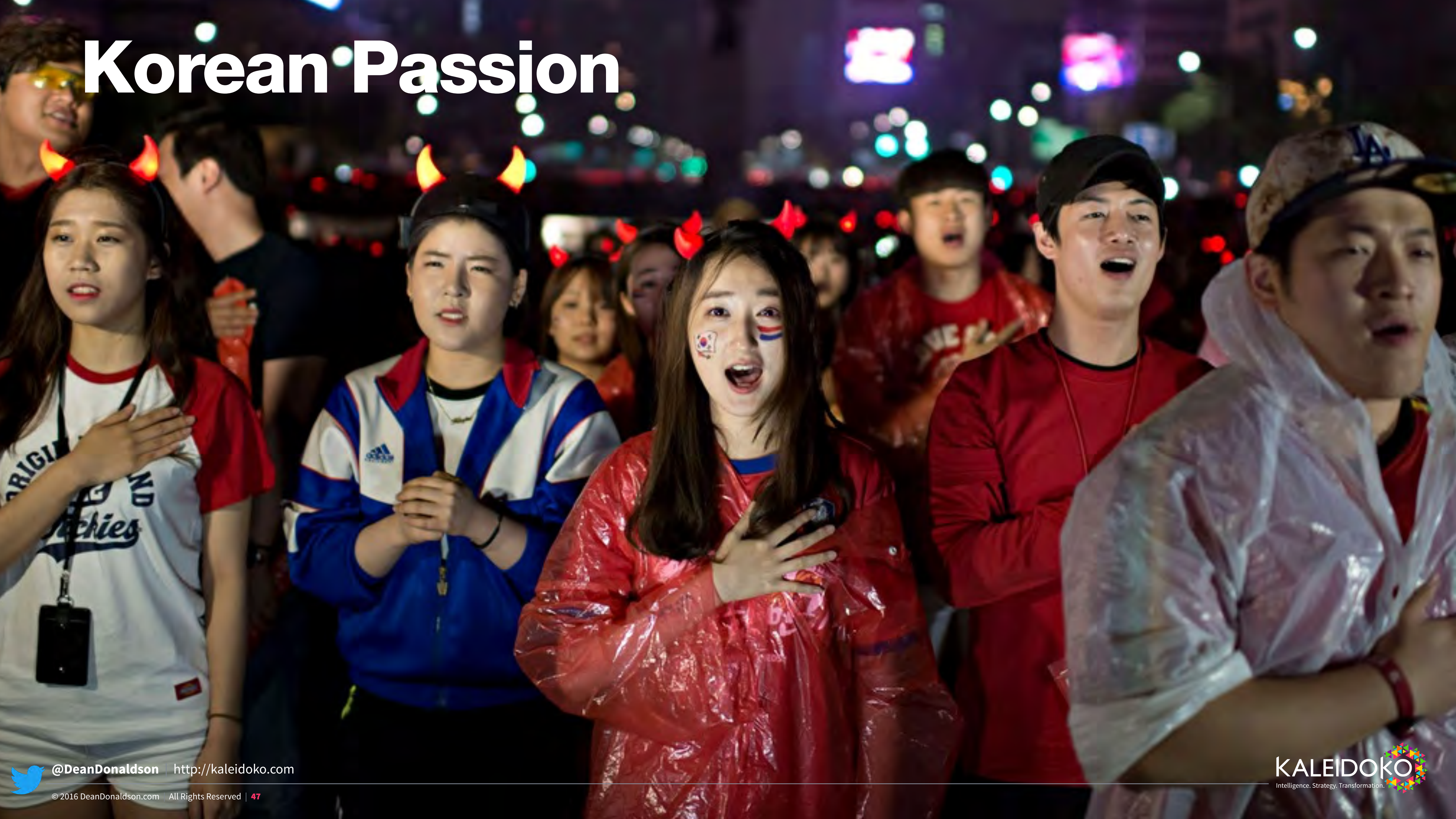


social interaction

Shared community experiences



Korean Passion





**KOREA
BASEBALL
ORGANIZATION**

Baseball 38,000



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eGames 100,000



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STAR WRAFT®



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STAR CRAFT II®

Lee 'Flash' Young-hi (23yrs)

\$500,000

Samsung White

sponsored heroes

斗皇族
STAR HORN



Tammy Tang
Singapore



A vibrant, celebratory scene from a StarCraft tournament. In the center, a male player wearing a blue Red Bull cap and a blue shirt is smiling broadly while holding a large, silver, multi-tiered trophy. He is surrounded by a crowd of people, some of whom are taking photos with cameras and smartphones. The background is filled with blue and purple confetti, and a large "STAR CRAFT" logo is visible on a wall. The overall atmosphere is one of excitement and triumph.

\$71M

Global Prizes 2015



eSports to eCulture



as big as Football in west



eSports to eCulture



OnGameNetwork TV



eSports to eCulture



***“Manages the broadcasting of e-Sports,
the formation of new events... as well as encourage
the playing of video games by the general population.”***

Ministry of Culture, Sports & Tourism



eSports to eCulture



eSports is now Mainstream TV



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Where's wally





Where's westy





1.9Bn

Global Gamers



260M

eSports viewers



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Source: New Zoo, April 2015



>300%

Growth YoY



Dedicated eSports Bars

2X

Growth of 2014



The background of the image is a high-angle, wide shot of a massive arena filled with spectators. The crowd is densely packed, and the lighting is a mix of red and blue, creating a vibrant atmosphere. In the center of the arena, there's a stage area with various structures and equipment. Two large video screens at the top of the arena show a broadcast of the event, featuring commentators and game footage. The League of Legends Championship Series logo is prominently displayed in the center, rendered in a metallic, 3D style. The logo consists of the words "LEAGUE of LEGENDS" in a large, bold font, with "CHAMPIONSHIP SERIES" in a slightly smaller font below it. The entire logo is set against a dark, shield-like background.

LEAGUE of LEGENDS CHAMPIONSHIP SERIES



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334M

over 4 week period





36M

Viewers of 2015 Final

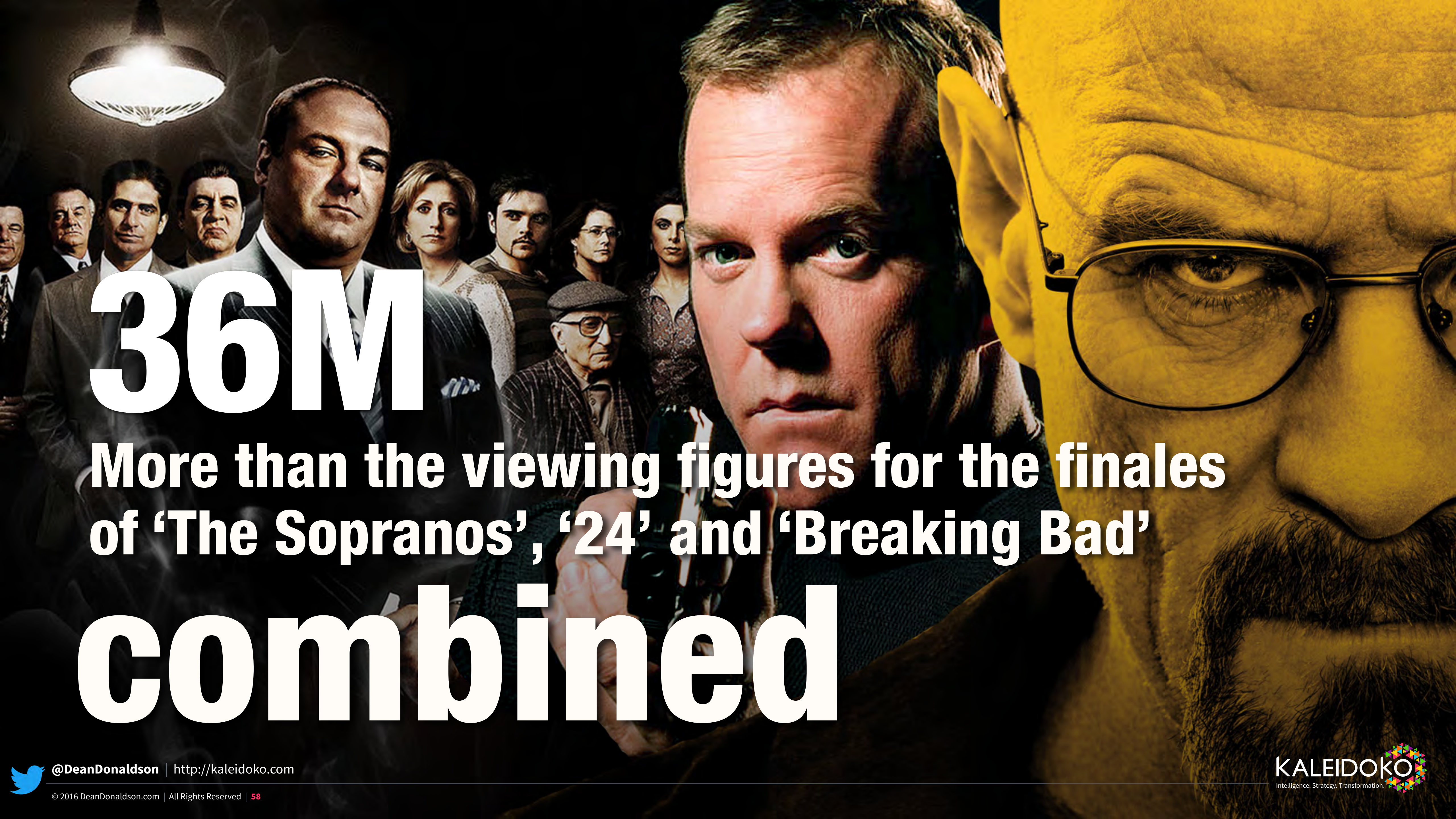




36M 112M

THIRD OF SUPERBOWL





36M

More than the viewing figures for the finales
of 'The Sopranos', '24' and 'Breaking Bad'
combined





**“We now have a generation of TV viewers who
prefer watching eSports
to traditional sports like ice hockey”**



Twitch.TV

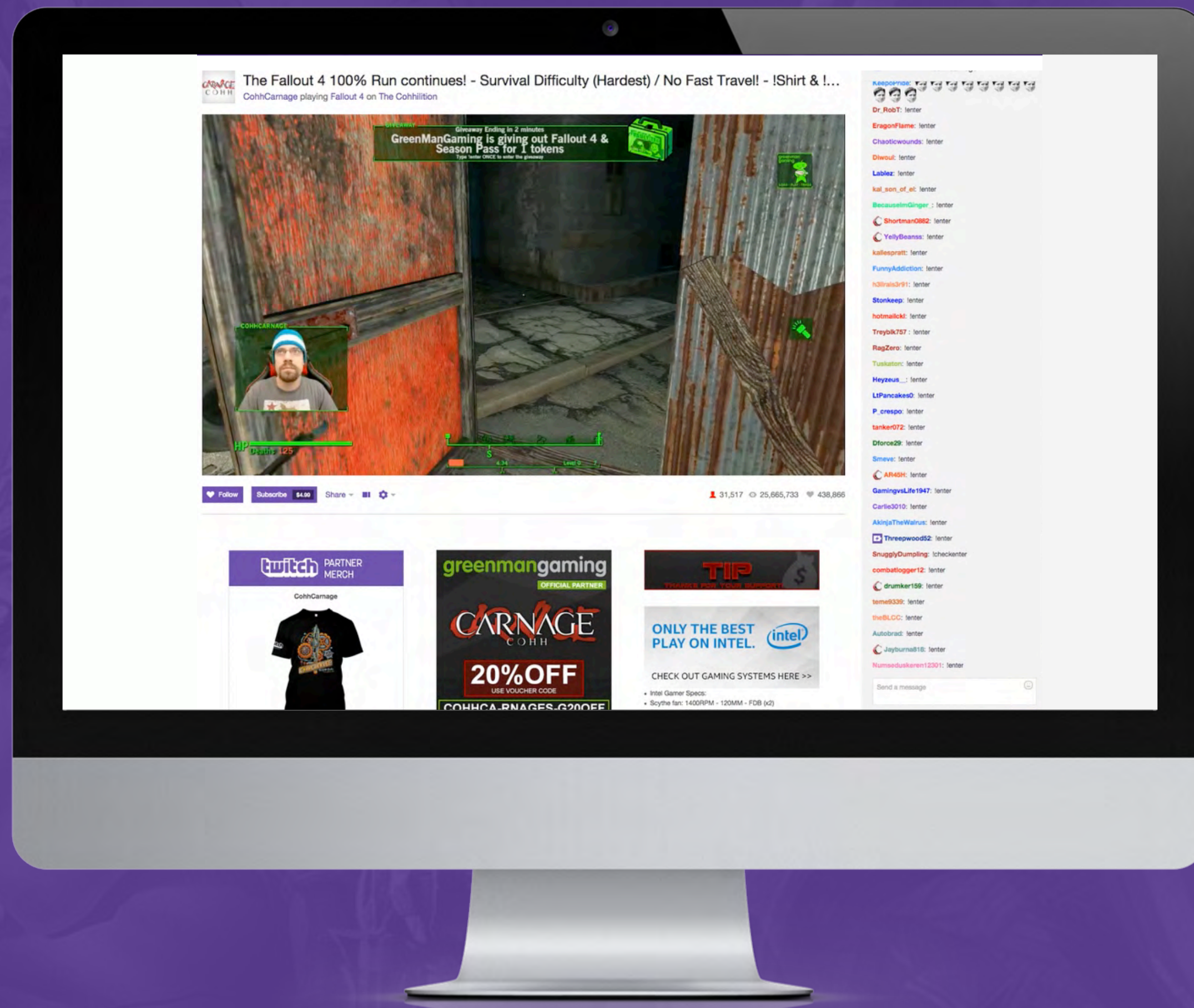
amazon[®]
Subsidiary

Real-time interaction between broadcasters and their audience

3X

More videos viewed than Facebook

>20 hrs week



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Source: Twitch Stats 2015

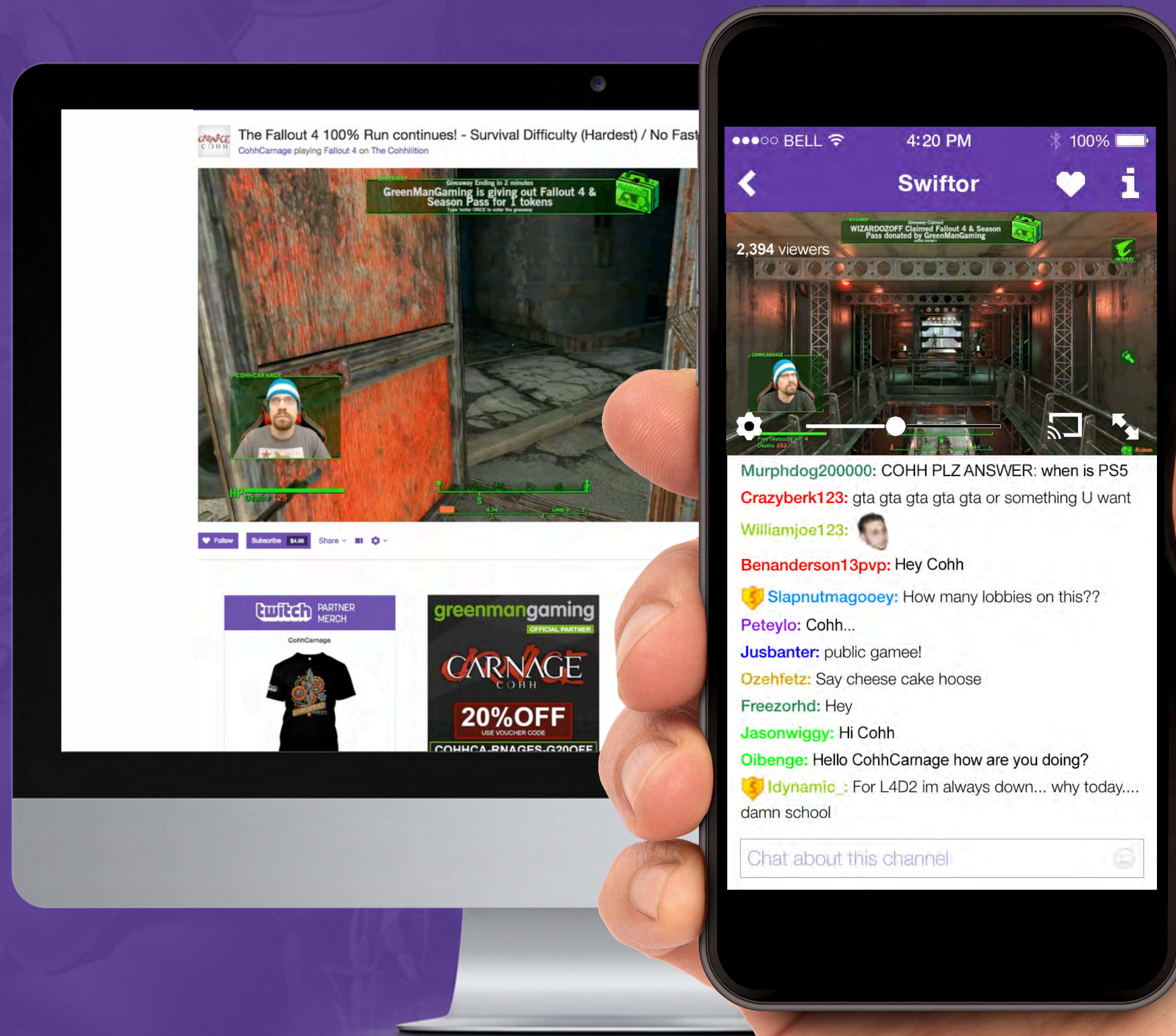
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Twitch.TV

amazon[®]
Subsidiary

Real-time interaction between broadcasters and their audience

>10% mobile
And growing each month



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Source: Twitch Stats 2015

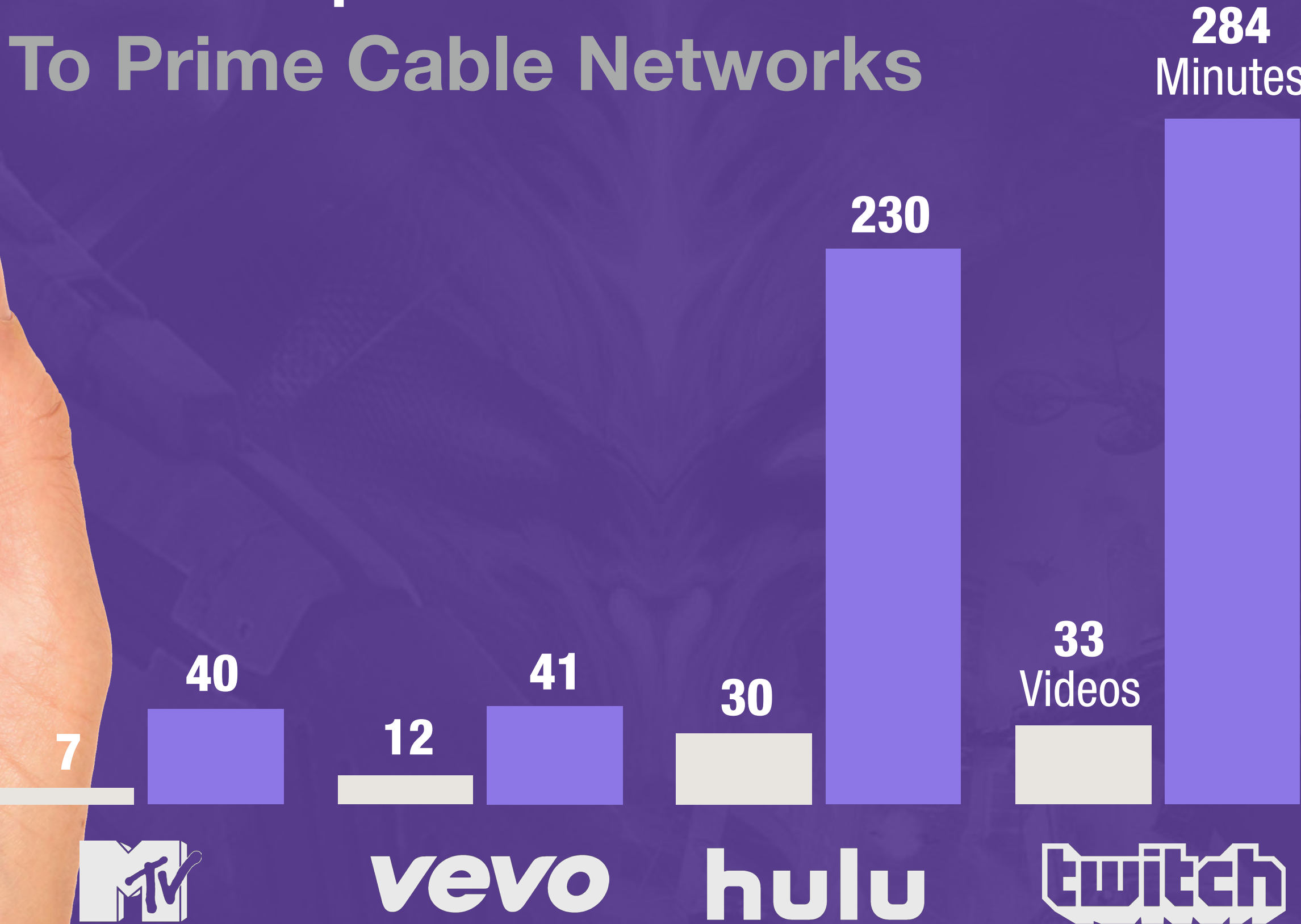
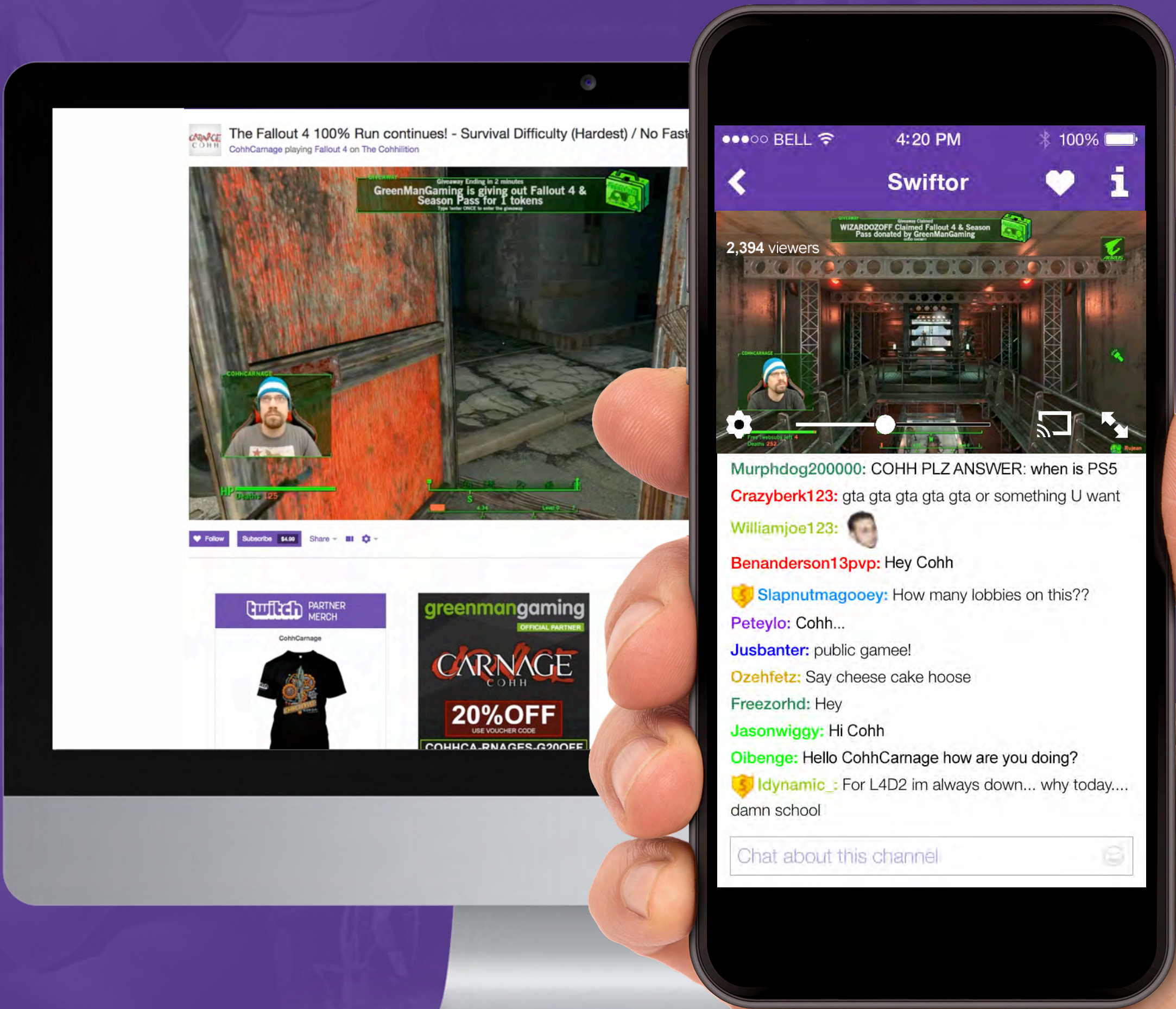
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Twitch.TV



Real-time interaction between broadcasters and their audience

Comparison To Prime Cable Networks



production cost?!

Films to Games

Aliens



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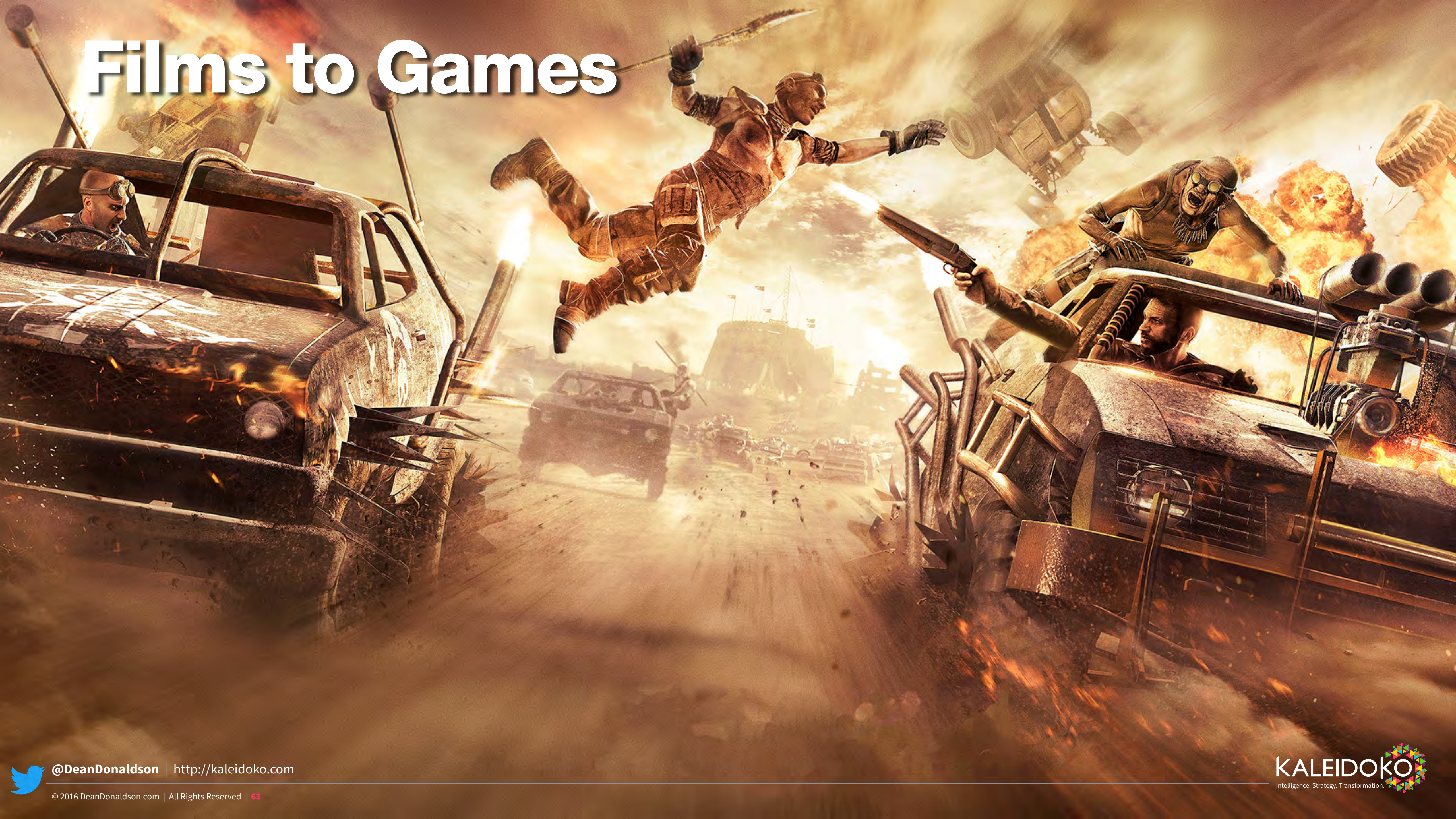
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Films to Games

Batman



Films to Games



Films to Games

Mad Max



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Games to Films

Resident Evil



Games to Films

Tomb Raider



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\$156M in first 5 days
on 67% all screens





highest-grossing film in China





China bigger then Hollywood





Films in Chinese first?!



Trials on Tatooine



Trials on Tatooine

Wield your own lightsaber









Battle of the Bastards



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520%

OTT companies are
researching, preparing or
launching VR-video content

Bastardising of Television





Travel with Bran



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Source: Streaming Media and Unisphere Study



48%

OTT companies are
expecting ~50% growth
YoY with VR-video content



SHORT-FORM snacks





RMR | **RICK
MERCER
REPORT**





22
MINUTES

★ ★ ★ ★ ★
TRUMP
MAKE AMERICA GREAT AGAIN!



BARONESS VON SKETCH SHOW



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BEAR GRYLLS

coming up

 **Discovery**
CHANNEL™

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BEAR GRYLLS

PREVIOUSLY

Super annoying on VoD

 **Discovery**
CHANNEL™

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Capsules Exclusives



Digital Originals



L'ÉCRIVAIN PUBLIC



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Digital Originals

ICI  TOU.TV

Switch & Bitch



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Digital Originals



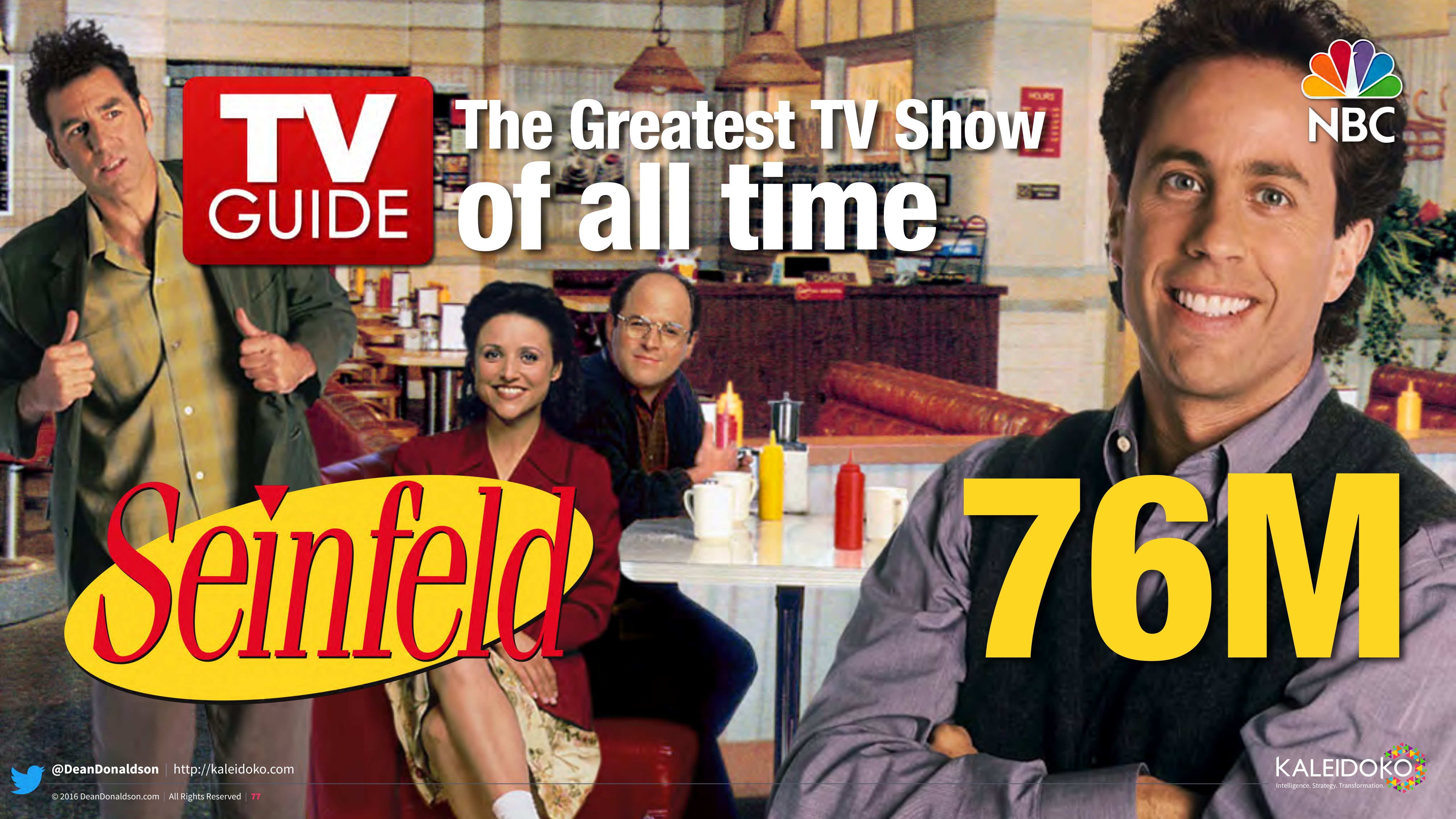
▶ LA VIE N'EST PAS
UN MAGAZINE
SÉRIE ORIGINALE



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The Greatest TV Show
of all time



Seinfeld

76M



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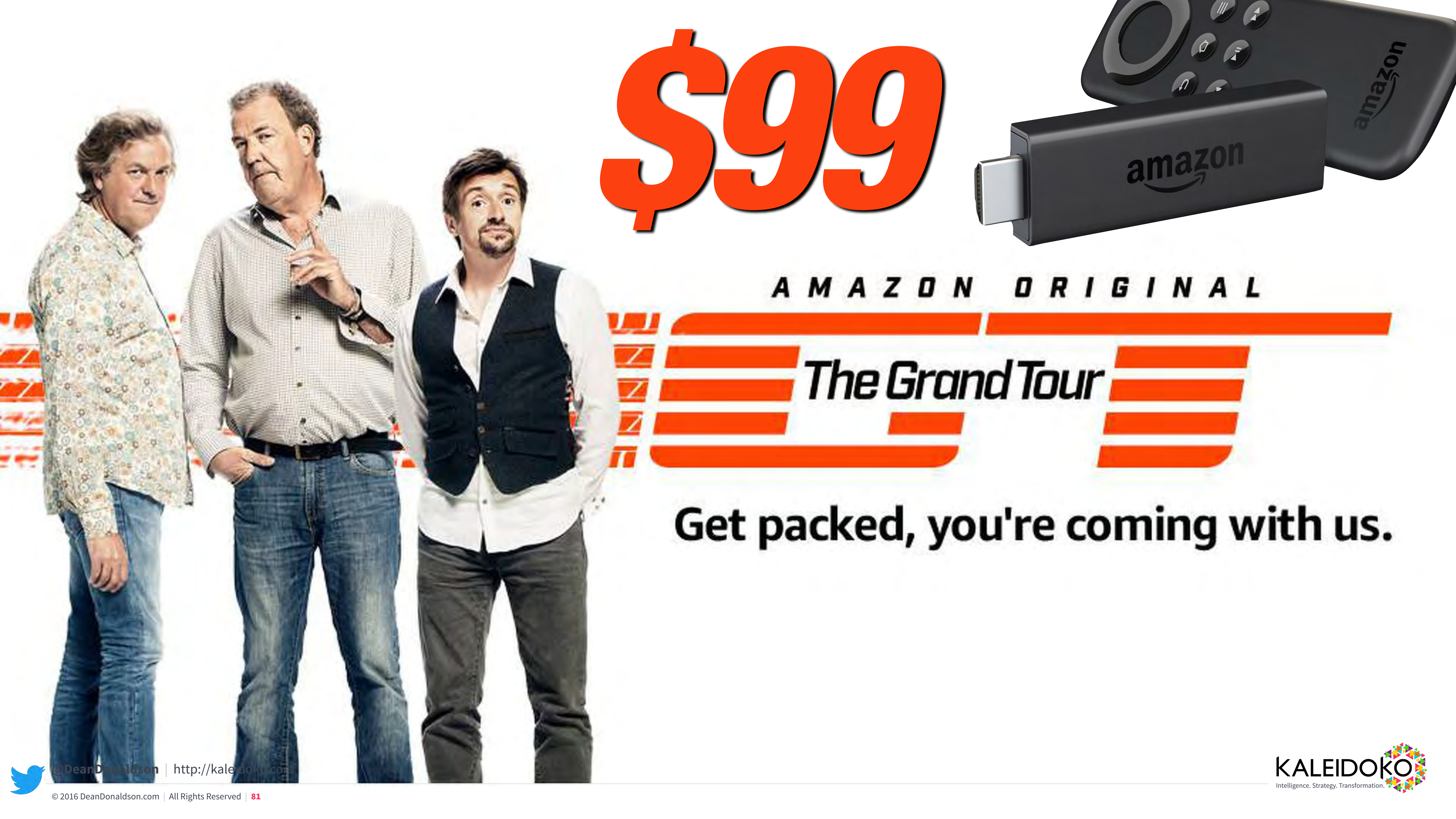


1Bn

Top Gear







\$99



AMAZON ORIGINAL



Get packed, you're coming with us.



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THE *Late* SHOW WITH JAMES CORDEN



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Source: AdWeek 2016

THE

late

SHOW

“3”

THIS excites advertisers!



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Source: AdWeek 2016

141M Views in 3 Days



facebook Live



141M Views in 3 Days





100 DRAGONS



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Television
Academy

EMMYS®

Been expanded to cover
short form content

Minimum 6 episodes of 15 minutes or less.



Television
Academy

EMMYS®

best short form
actor / actress





TV is hijacked by Games Console



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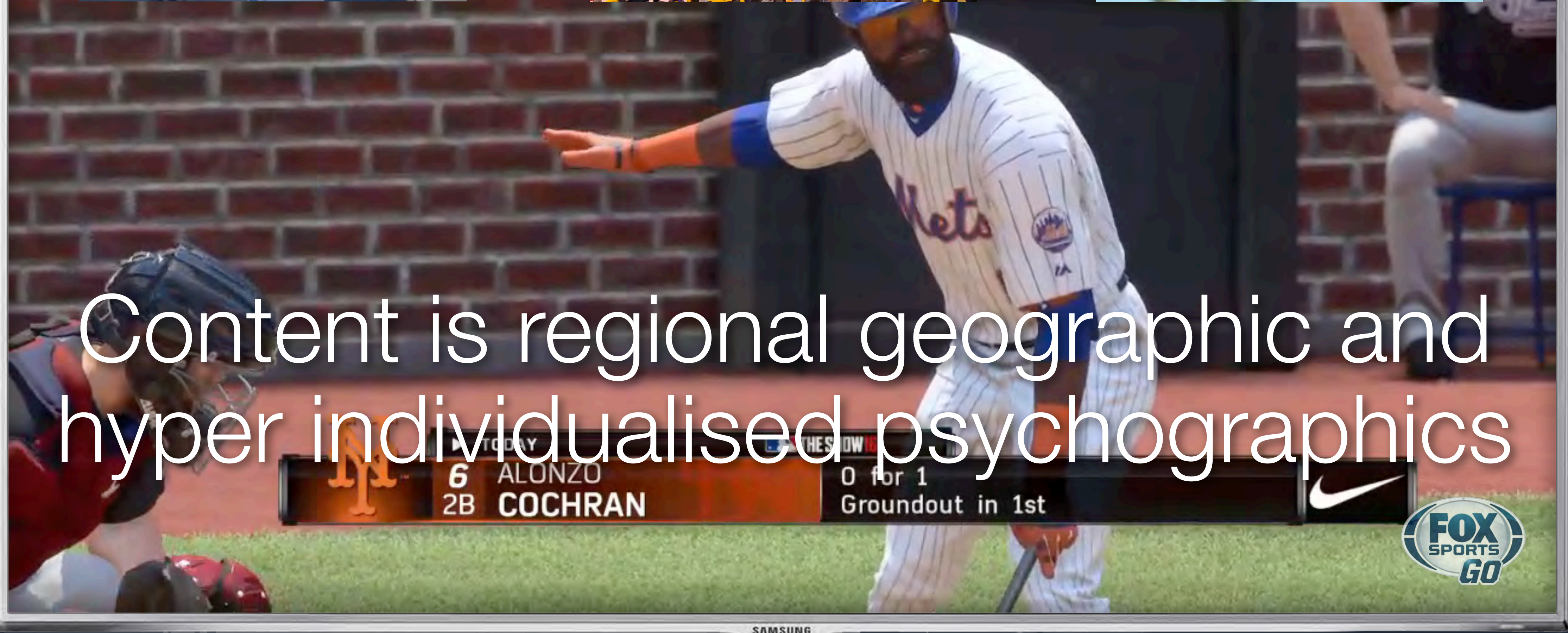
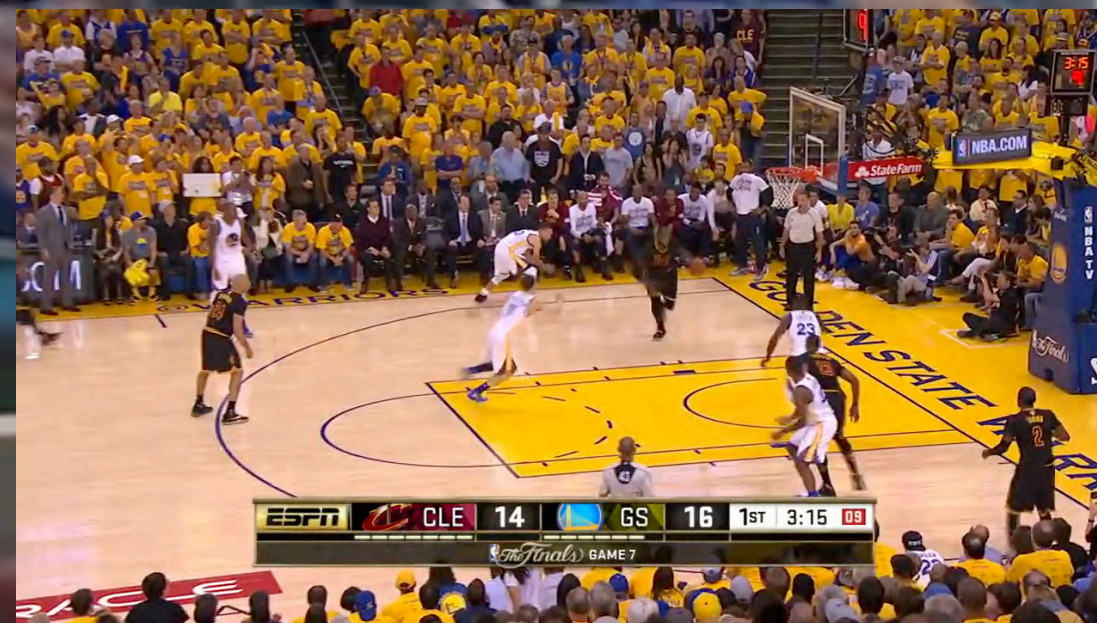




Games Console is hijacked by tv







Content is regional geographic and hyper individualised psychographics

Monitor

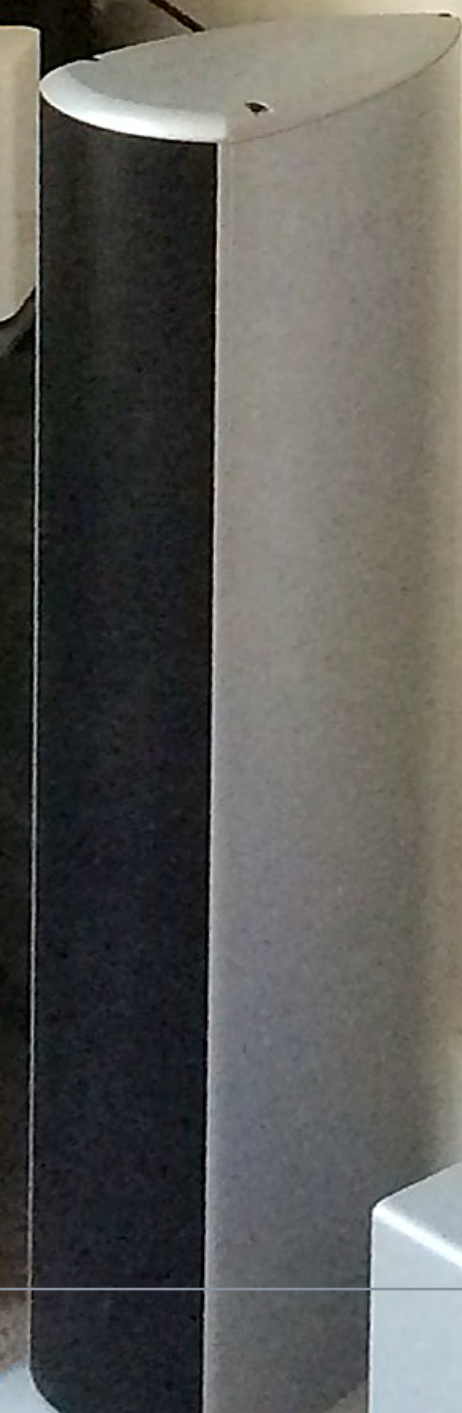
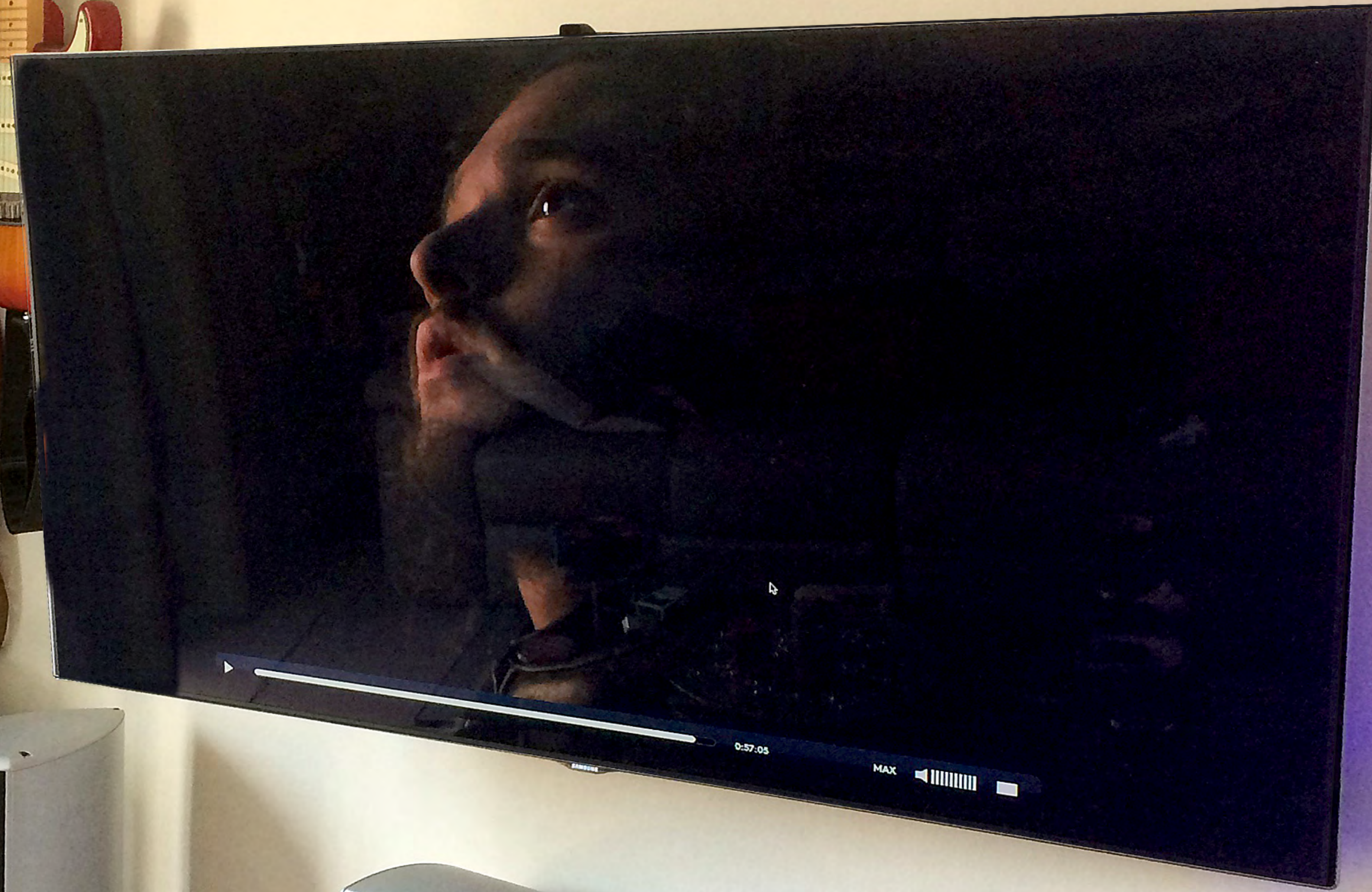
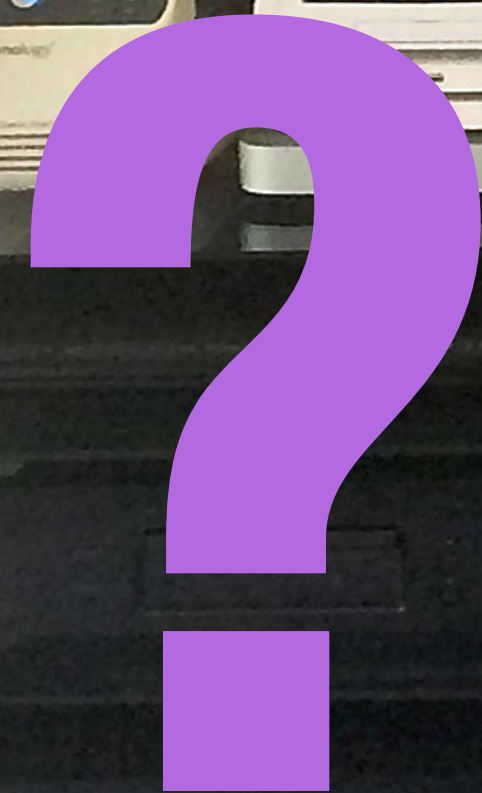


Smart

SAMSUNG TV SERVICE DEAD AS OF 1 JULY 2015



Source?



Ads

WATCHING TV

Press Esc to exit full screen mode.



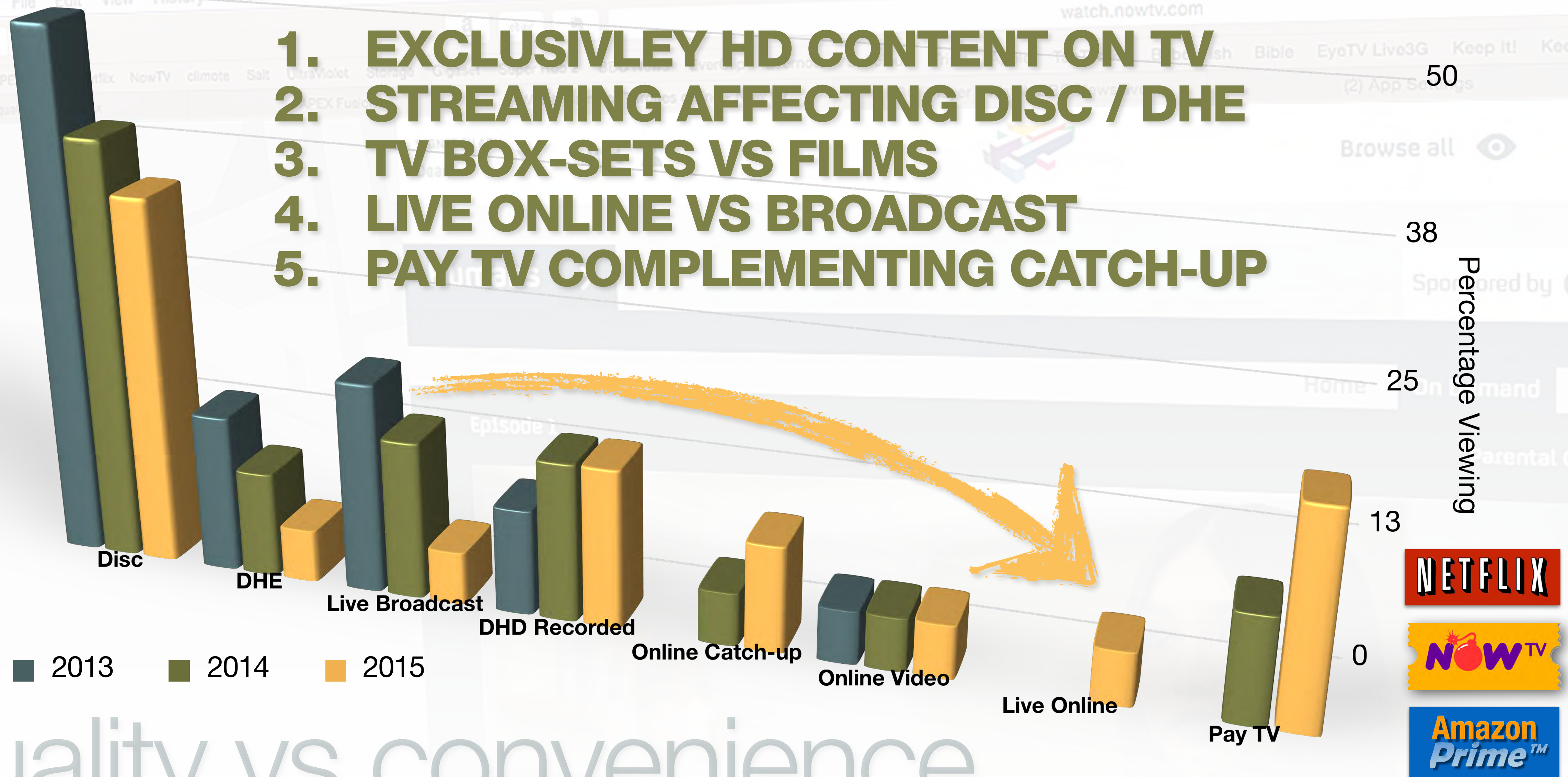
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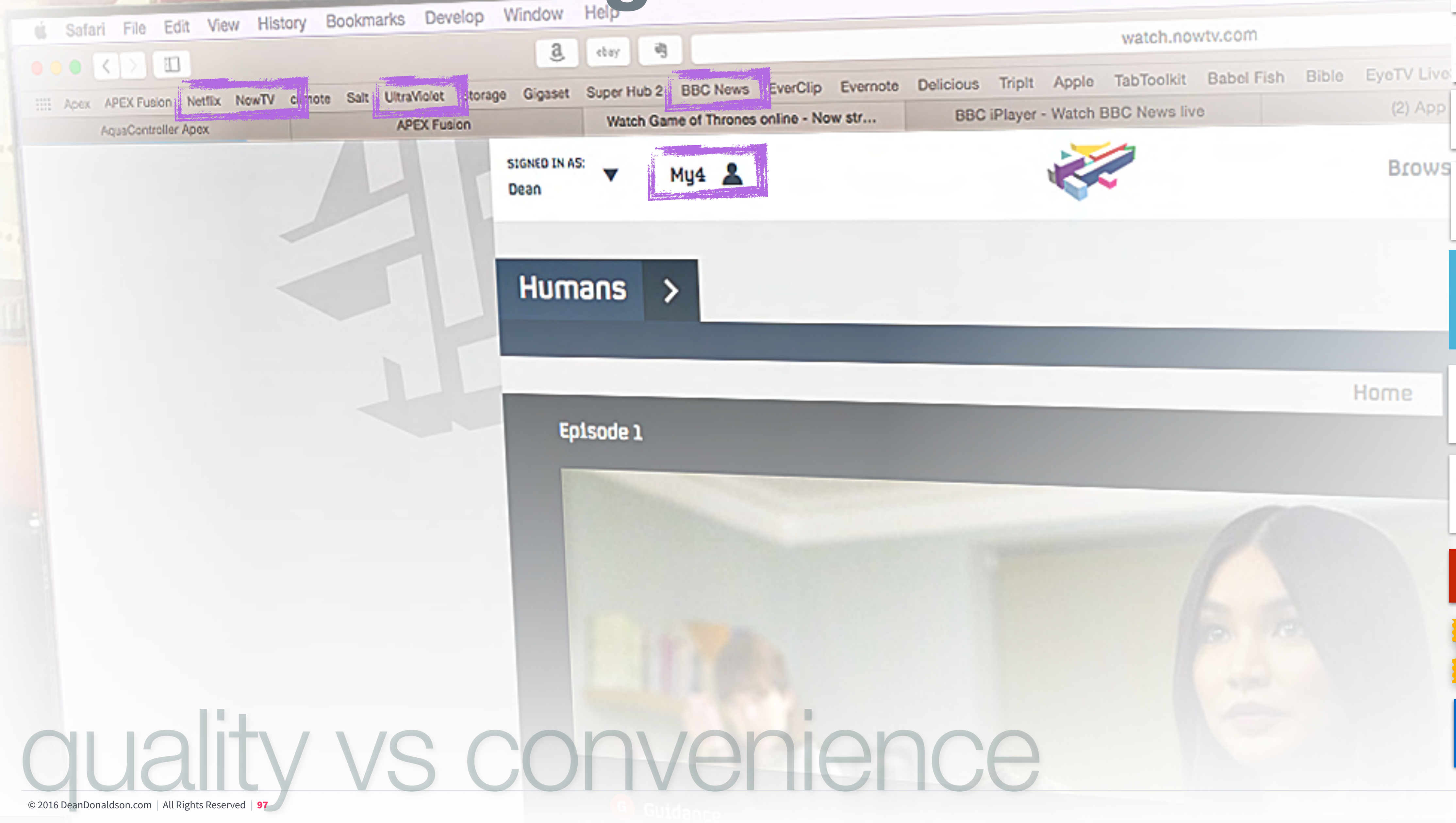
Dean's Viewing Habits

1. EXCLUSIVELY HD CONTENT ON TV
2. STREAMING AFFECTING DISC / DHE
3. TV BOX-SETS VS FILMS
4. LIVE ONLINE VS BROADCAST
5. PAY TV COMPLEMENTING CATCH-UP



quality vs convenience

Dean's Viewing Habits



quality vs convenience

Dean's Viewing Habits



Dean's Viewing Habits

mess

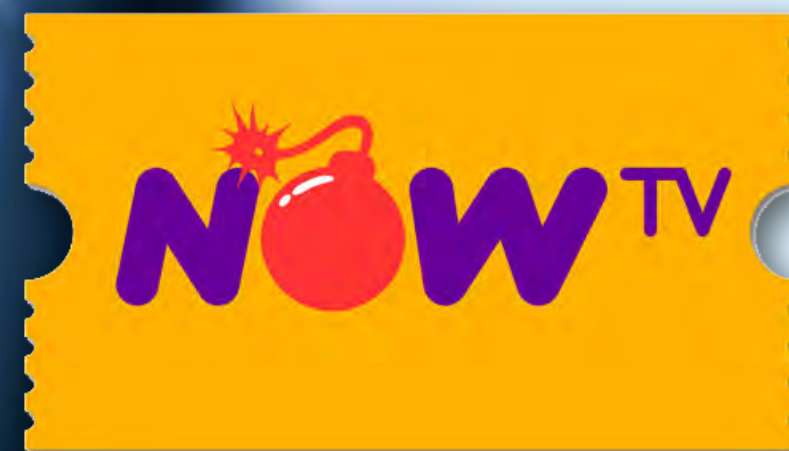
NO SINGLE [USEABLE] INTERFACE



\$99

per month for huge waste =
consumers are 'cord-cutting'

Bell



Roku V EVO hulu

D-DAY



**LATEST
RELEASE**



The good old days



NETFLIX



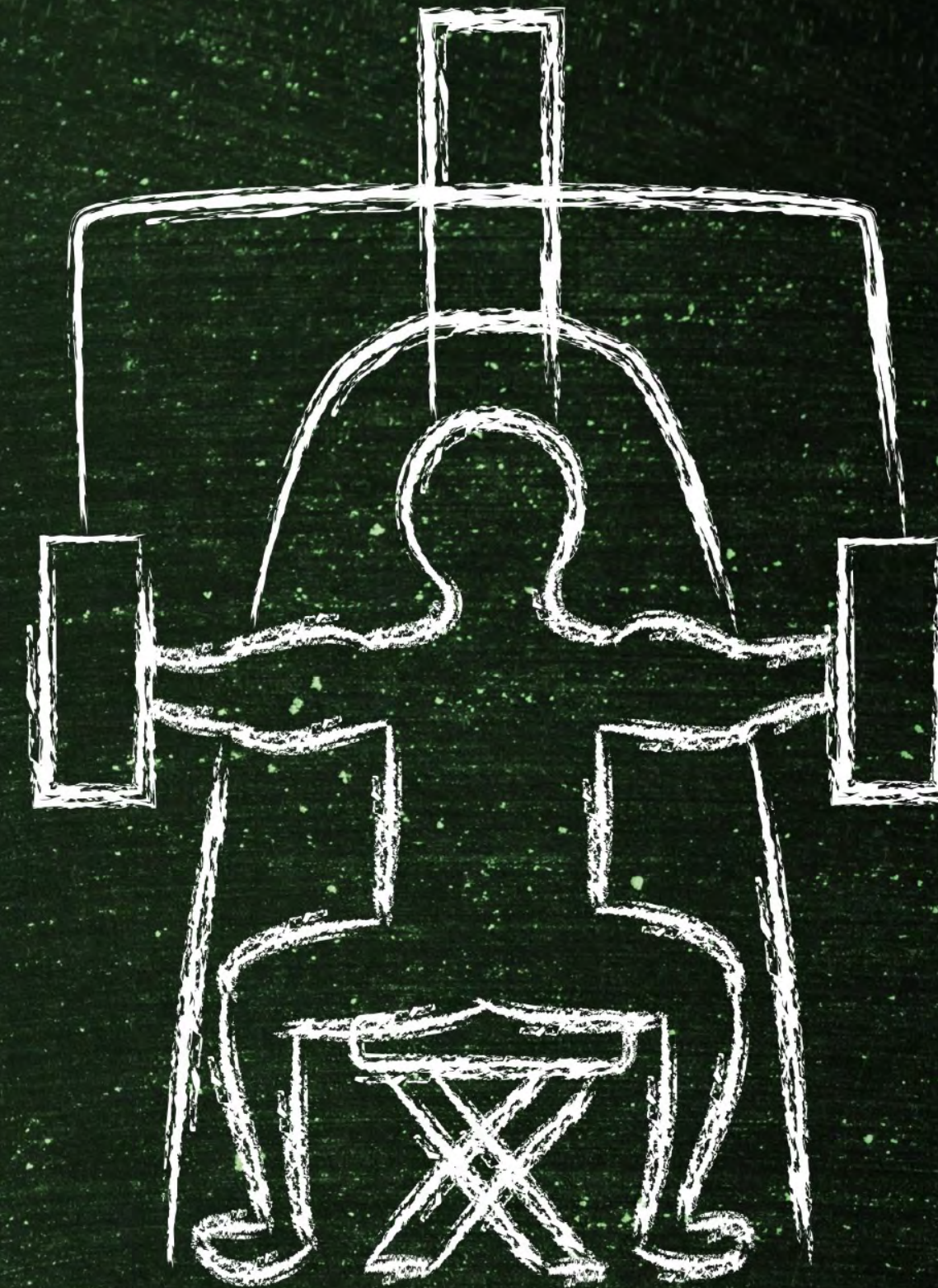
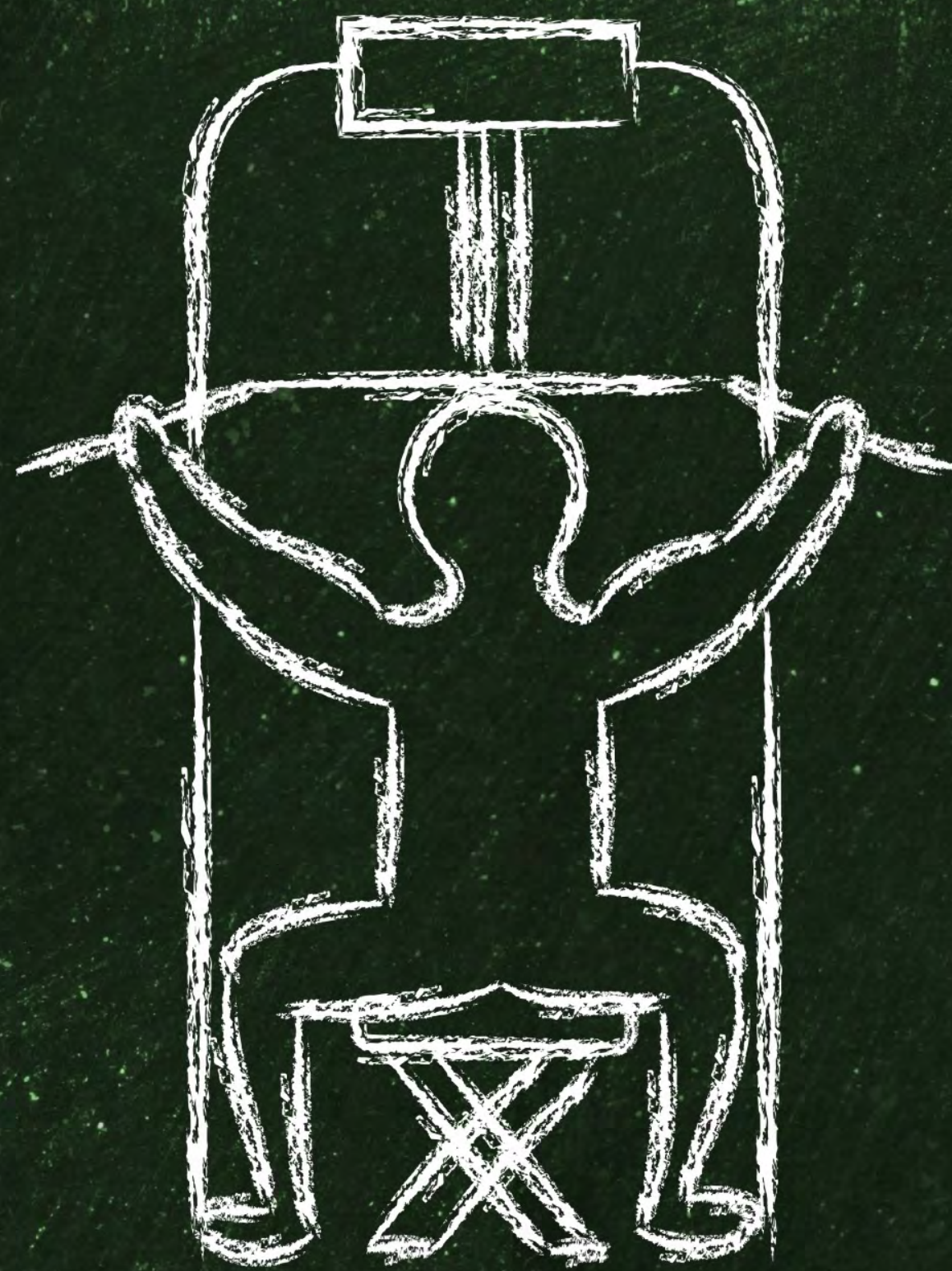






Blockbuster? Bargain Basement





GYM MEMBERSHIP



2016 Gym Activity

JANUARY

SUN	MON	TUE	WED	THU	FRI	SAT
X	X	X	X	X	X	X
X	11	X	X	X	15	X
17	X	19	X	X	22	23
X	25	X	27	28	X	30
31						

FEBRUARY

SUN	MON	TUE	WED	THU	FRI	SAT
	1	X	3	4	X	6
X	8	9	X	11	12	13
14	15	X	17	18	19	20
21	22	23	24	X	26	27
28	29					

MARCH

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	X	5
6	7	8	9	10	11	12
13						
20						
27						

APRIL

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
	3	4	5	6	7	8
					14	15
					21	22
					28	29

MAY

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

JUNE

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	X	X	X	X
19	20	21	22	23	24	25
26	27	28	29	30		

SUN
3
10
17
24
31

THU	FRI	SAT
4	5	6
11	12	13
18	19	20
25	26	27



\$£€ Monthly

SUN	MON	TUE	WED	THU	FRI	SAT
4						3
11	12		14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

SUN	MON	TUE	WED	THU	FRI	SAT
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

SUN
13
20
27

SAT
3
10
16
17
23
24
29
30
31



2015 OTT CHURN

60%

TRUE DETECTIVE

2





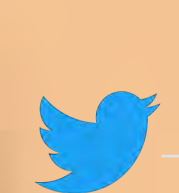
HBO GO

NOW TV

Crave tv



CONTROL DISTRIBUTION



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Be

sky

LOSING

250k p.a.

SATELLITE SUBSCRIPTIONS



The image is a title card for the TV series "Game of Thrones". It features a dark, ornate wooden frame with intricate carvings. At the top, there is a carved dragon head on the left and a lion's head on the right. In the center, a large, glowing orange and yellow flame-like emblem is visible. The title "GAME OF THRONES" is written in a large, serif font, with the word "OF" in a smaller font. The letters are illuminated from within, giving them a golden, glowing appearance. The background is a warm, golden-yellow color with a subtle, swirling pattern.

GAME OF THRONES



The background of the slide is a blurred image of the Game of Thrones title card. It features the Iron Throne in the center, flanked by two direwolves. The words "GAME OF THRONES" are visible in the background, though partially obscured by the large text overlay.

Q2X2

NEW SUBSCRIPTIONS





WHO WILL STAY?!

\$20 monthly?!!



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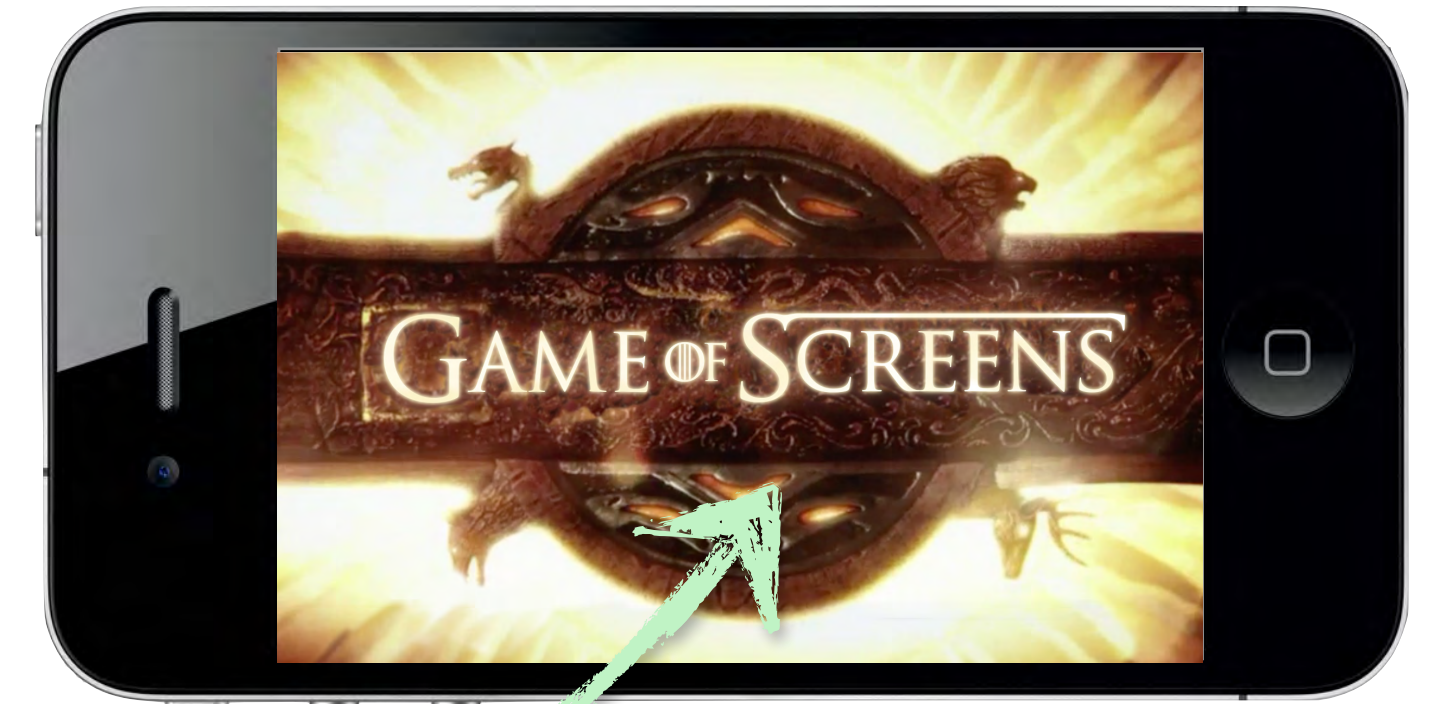
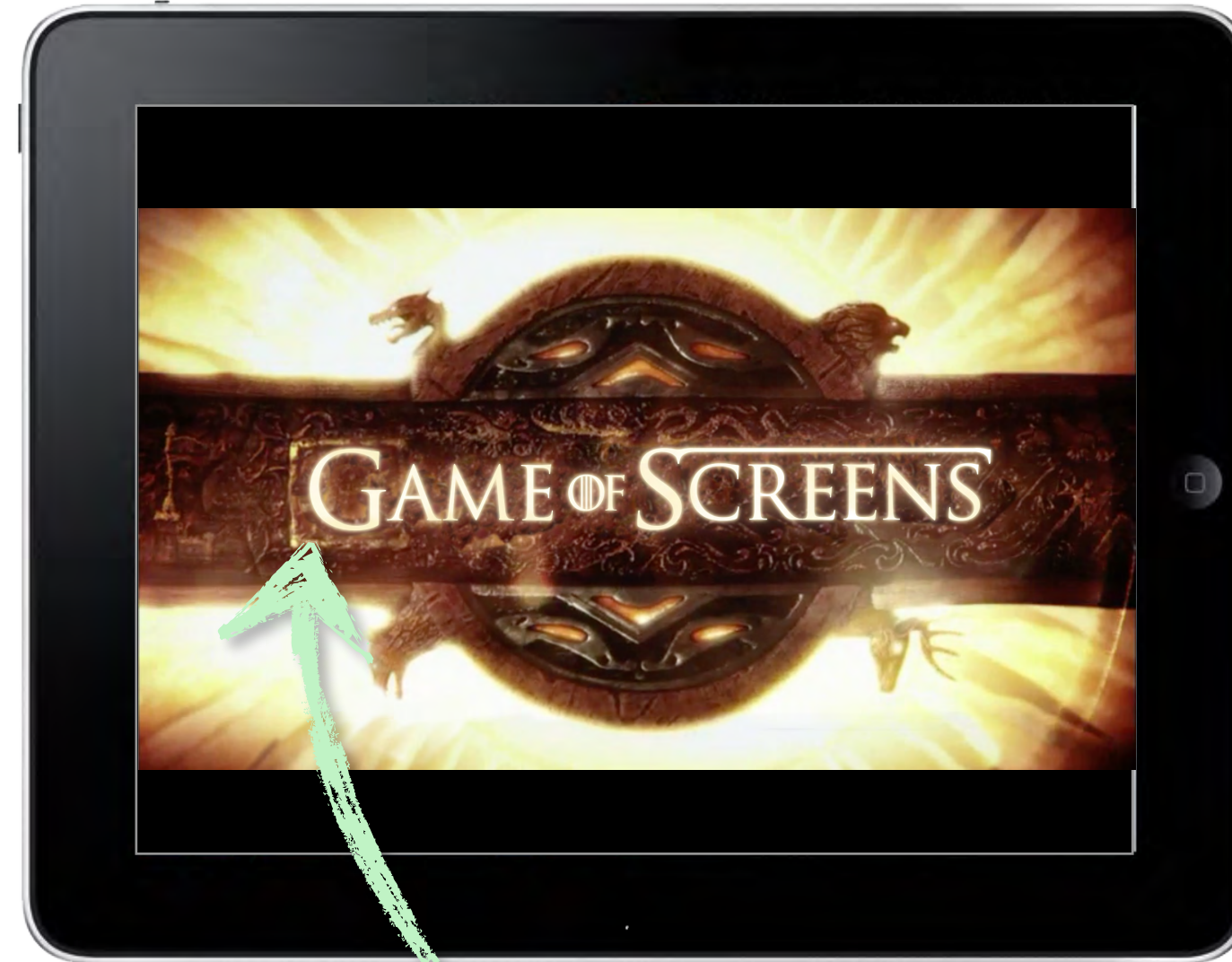




800%

**of video consumed by teenagers is
on a device other than the television**





ADRESSABILITY



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ce. Strategy. Transfor

Purely Personal



Purely Personal



Purely Personal Content and Advertising

FORGET TARGETING HOUSEHOLDS!!!
IT'S INDIVIDUALS

CSP Multiplay

Internet

Television

Mobile

Telephone



CSP Multiplay

Music

Health

Gaming

Connected
Cars



CSP Multiplay

Unified Bill
NOT
Unified Experience



Bell 4K PVR





\$150 PER ROOM

\$400
UHD Box

\$99
INSTALL



+\$18
EXTRA EACH MONTH

Fluid viewing **PREMIUM TV**



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iPlayer Loop hole



45%

16-34

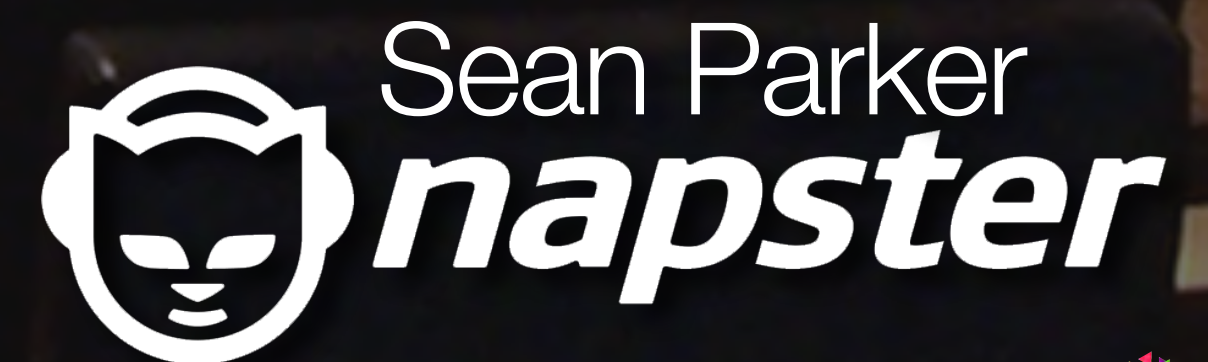
License Fee to extend to MultiScreen



\$150

installation of a box

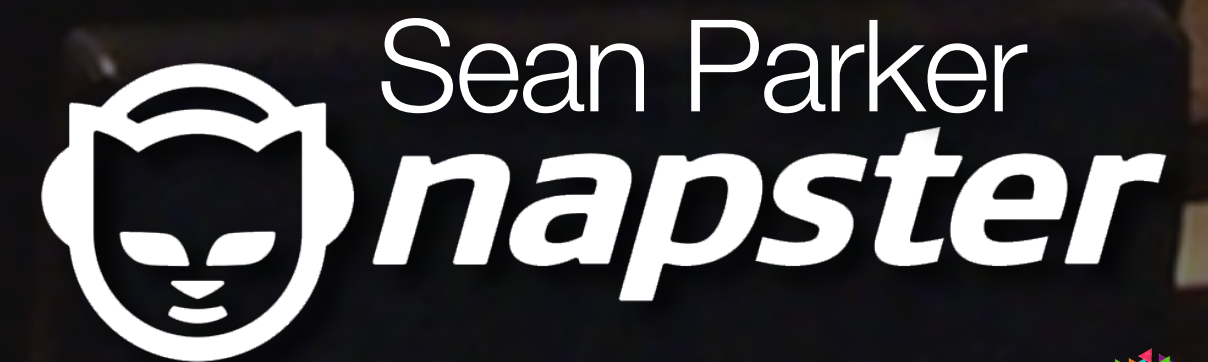
Screening Room



\$50

48 hour access to new film

Screening Room





\$20Bn

annual US spend renting TV boxes



“Cable and satellite TV companies
consistently rank near the bottom
of customer satisfaction studies”

F.U. Bell



Hulu meets Twitter meets Netflix

Watch, Cut & Share



Stream movies, videos &
PrimeTime TV for **free**
on your mobile.





Apple tv



Interactive
Games



2020 Apple TV

Actor: Clint Eastwood
Spoken by "Harry Callahan" from
the 1983 film Sudden Impact...

[Read More](#) | [Share](#) >

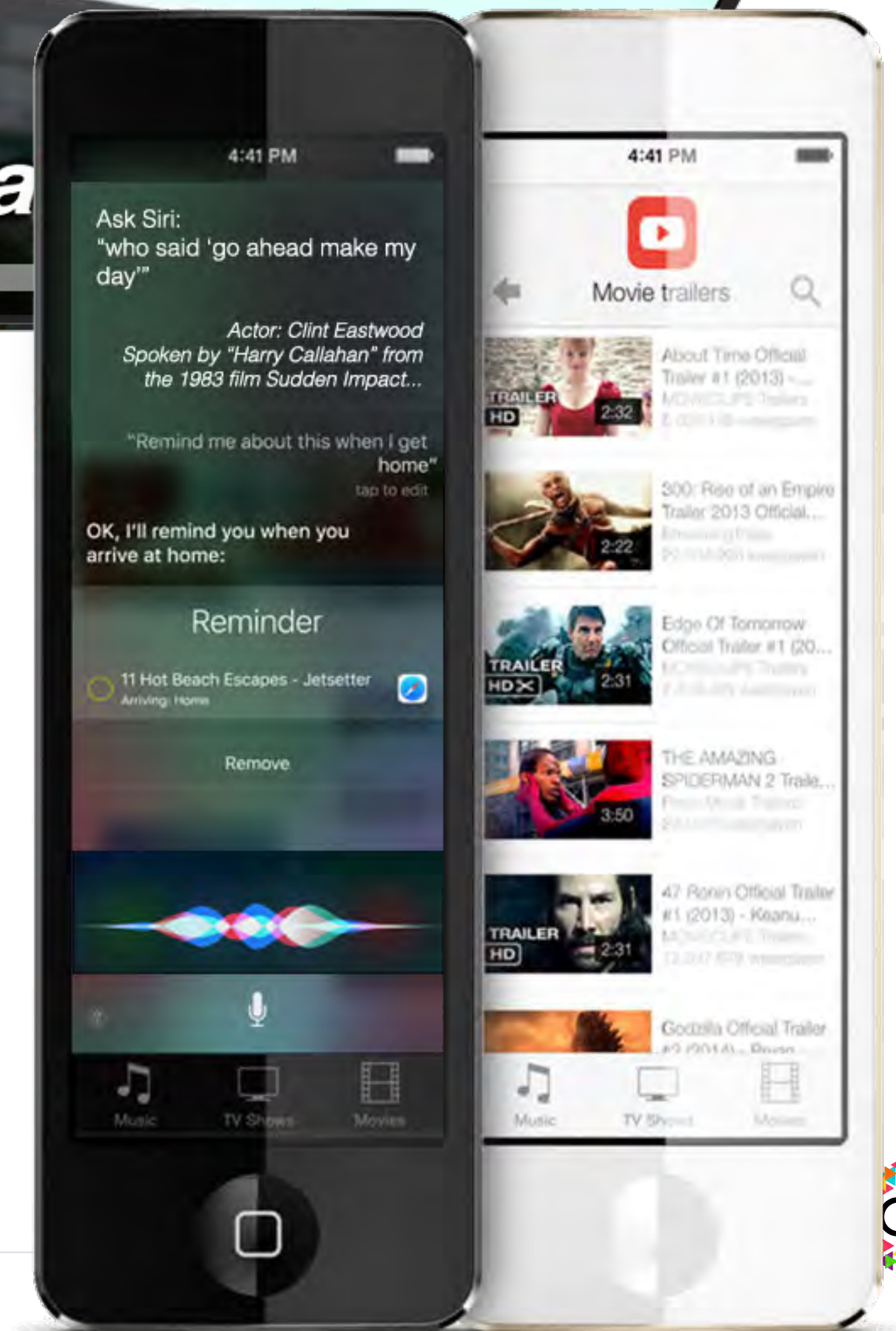
"Go Ahead Punk, Make My Day"

35:23

Apple tv



Find quotes, play
segments & share



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2020 Apple TV

My Instant Queue

My Recommendations

New Releases

Last's Week Top Choices

Browse Genres

Search

Sign Out



★★★★★
Super High Me



★★★★★
Chop Shop



★★★★★
Romance & Cigarettes



★★★★★
Scarface



★★★★★
Donnie Brasco



★★★★★
Faithless



★★★★★
Yellow Asphalt



Aggregated Subscription



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T00 EXPENSIVE



T000 COMPLICATED



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Then: TV Easy



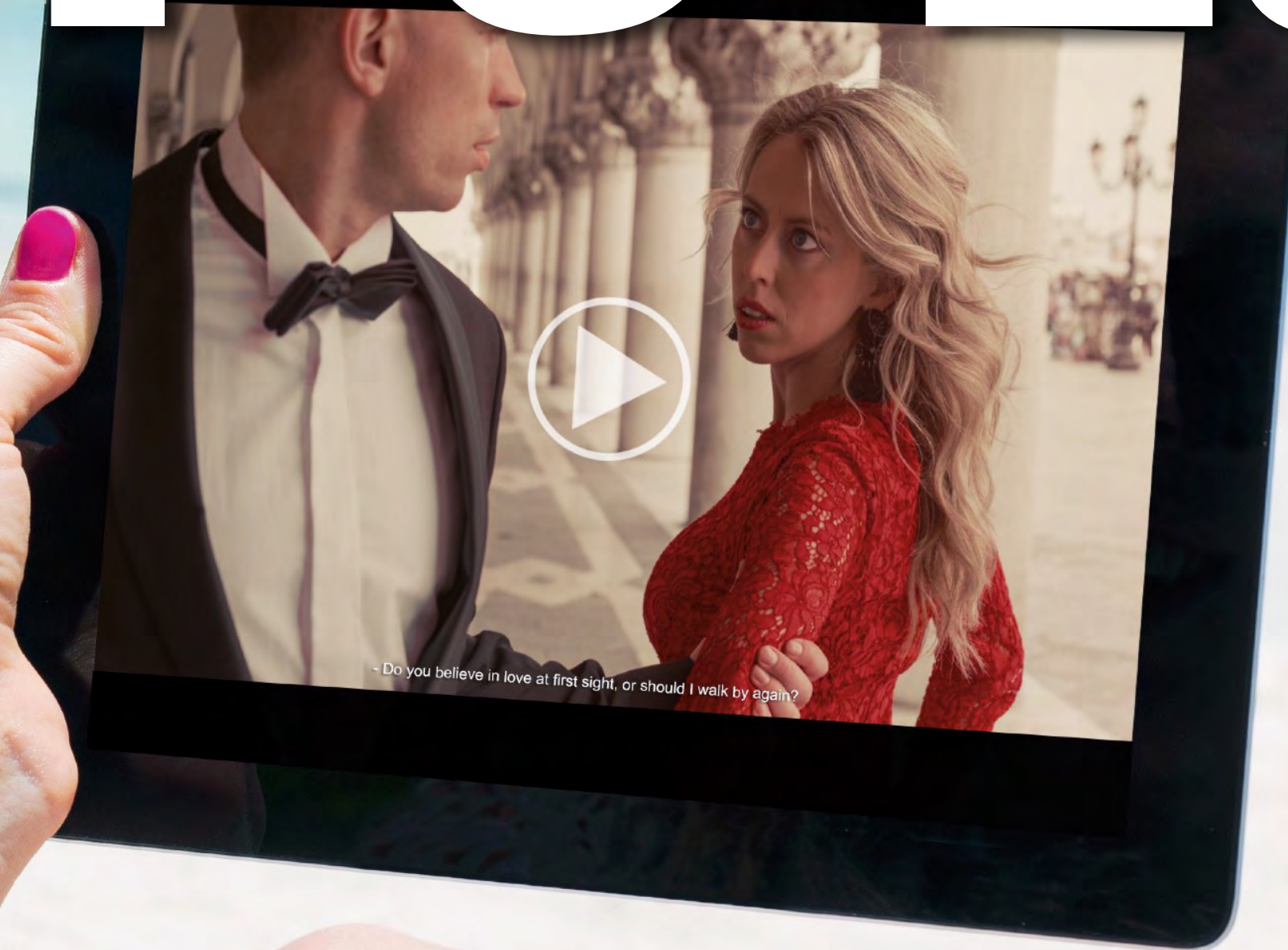
Then: PC Hard



Then: PC Hard



Now: PC Easy



Now: PC Easy



Now: TV Hard



Now: TV Hard

iPlayer

NETFLIX

HBO



NATIONAL
GEOGRAPHIC

MU^{TV}



ULTRA
VIOLET



TopGear

CRACKLE

Screening Room



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Now: TV Hard

€ \$ £

Screening Room



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Backwards



THE RISE OF PLANET OF THE APPS



EVOLUTION BECOMES REVOLUTION



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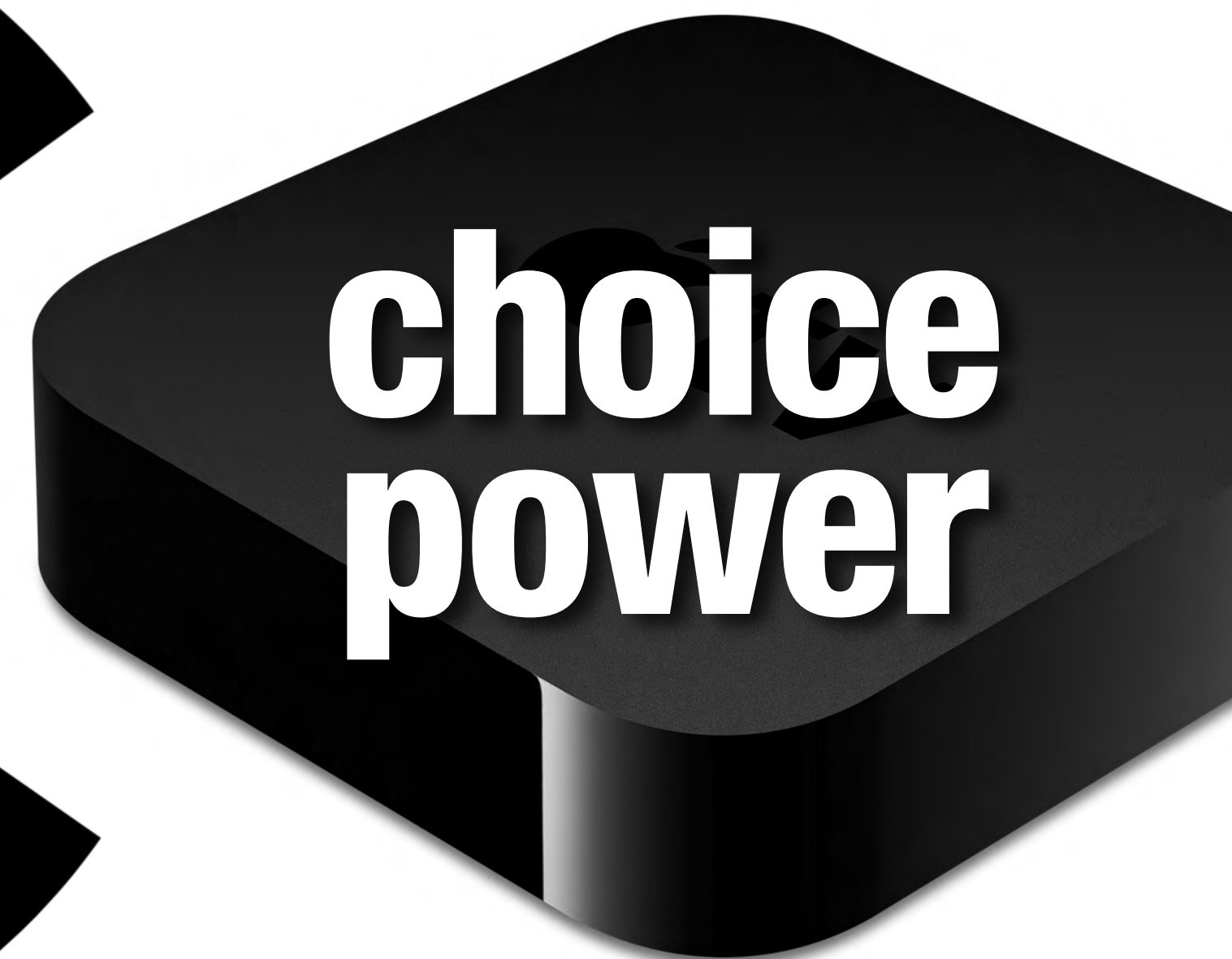
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A large, bold, black stylized letter 'R' that serves as a background logo. The vertical stem of the 'R' is on the left, and the curved part extends to the right, framing the central text.

**Subscribe to your cable
service through an app**





OPEN MINDS





THE WALKING DEAD



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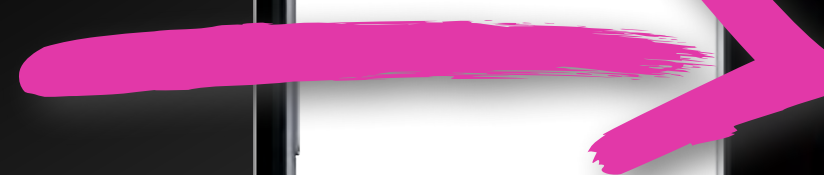
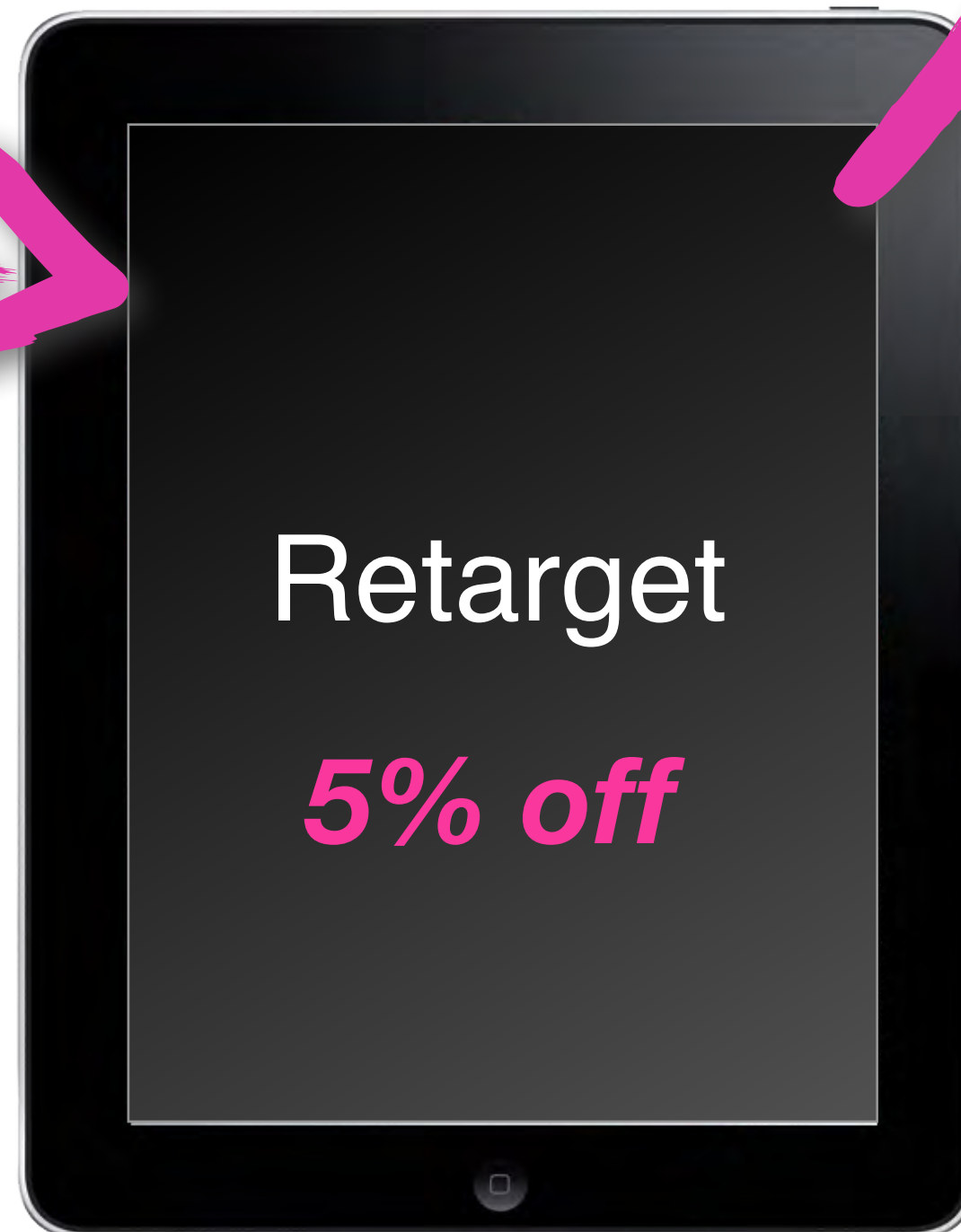
Interactive TV



Interactive TV

Beyond Game Shows
to control storylines...







> 88%



Loyalty

Welcome back Anna
Registering your interest



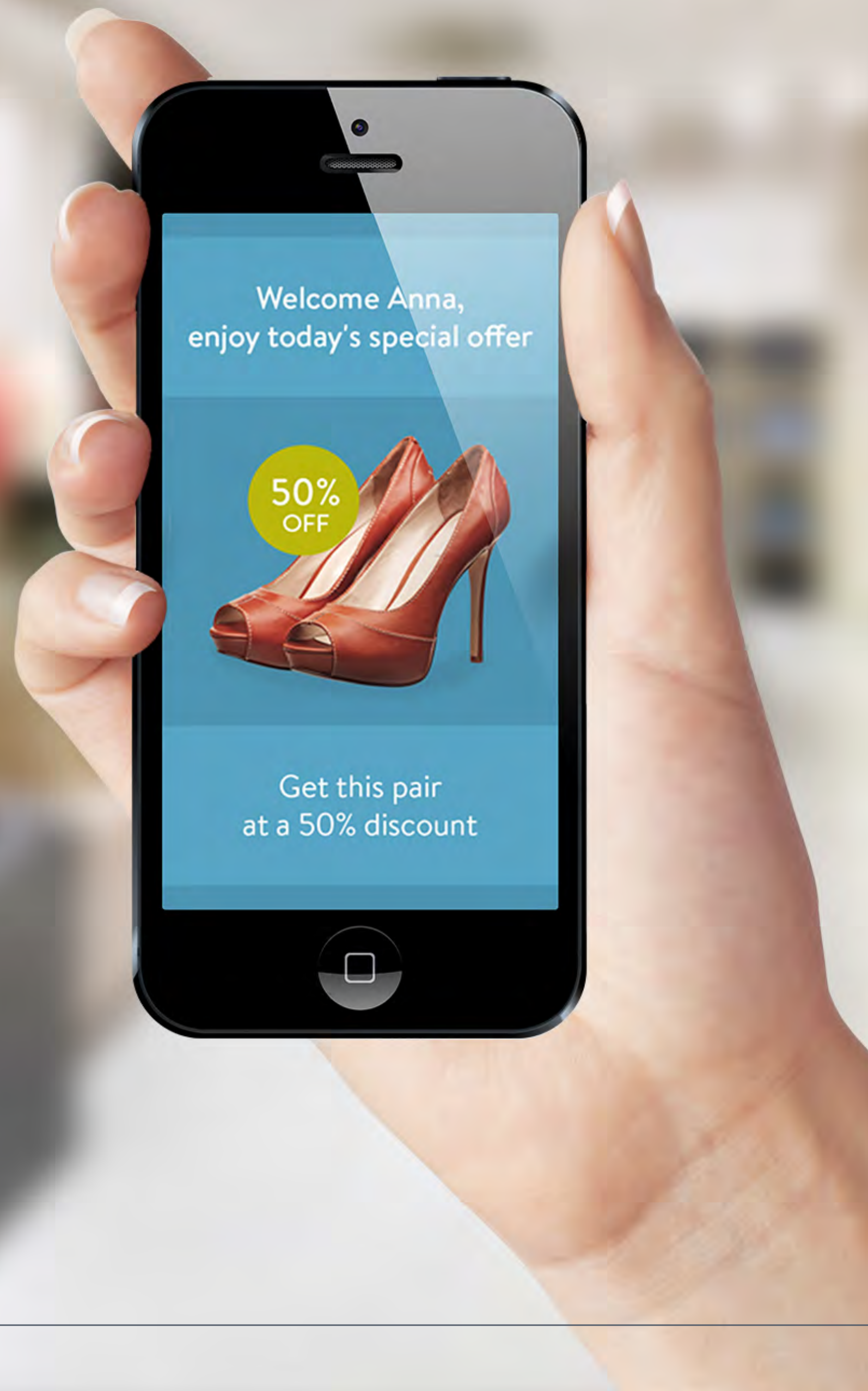
Cheerios
now added



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iBeacons





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50%
eCommerce Transactions
now via Mobile

10.08

 **Cheerios**

Order Complete

"2 for 1"

Recommend to Friend

Congratulations



Le Fin



kaleidoko.com

Thanks. Your turn.

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