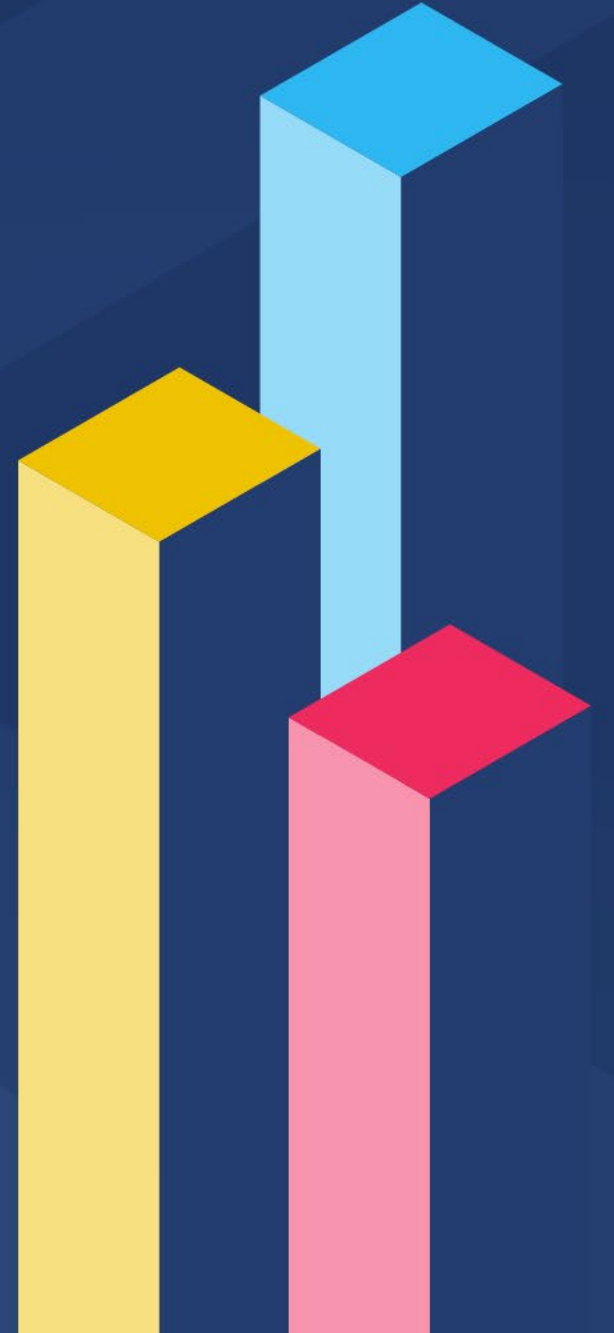




Blindsided:

The game-changers we might not see coming

MARK HARRISON
Managing Director, DPP





digital production partnership

SURVEY REPORT:
**WHY WE GET
TRENDS WRONG**
(And How To Get Them Right)



The Consumer and Professional Technology Trend Landscape 2010-2019

	CES HEADLINE	NAB HEADLINE	INDUSTRY BUZZ	CONSUMER TREND
2010	3D	3D	Interactive TV	Social Media
2011	Second Screen	TV Everywhere	3D	Mobile Video
2012	Second Screen	4K/UHD	Second Screen	Social Video
2013	Android TV	Second Screen	Social Media	Binge Viewing
2014	Internet of Things	4K/UHD Cameras	Google Glass	Streaming Video
2015	UHD	IP Broadcast	Drones	Vertical Video
2016	Internet of Things	Cloud	VR	Non-broadcast Video
2017	Voice Interface	Cloud	VR	Live Streaming
2018	Voice Interface	AI	Voice Interface	Social Video Stories
2019	8K	?	AI	?

Hello future, nice to meet you.





Blindsided by...

Voice Search

Haier | androidtv

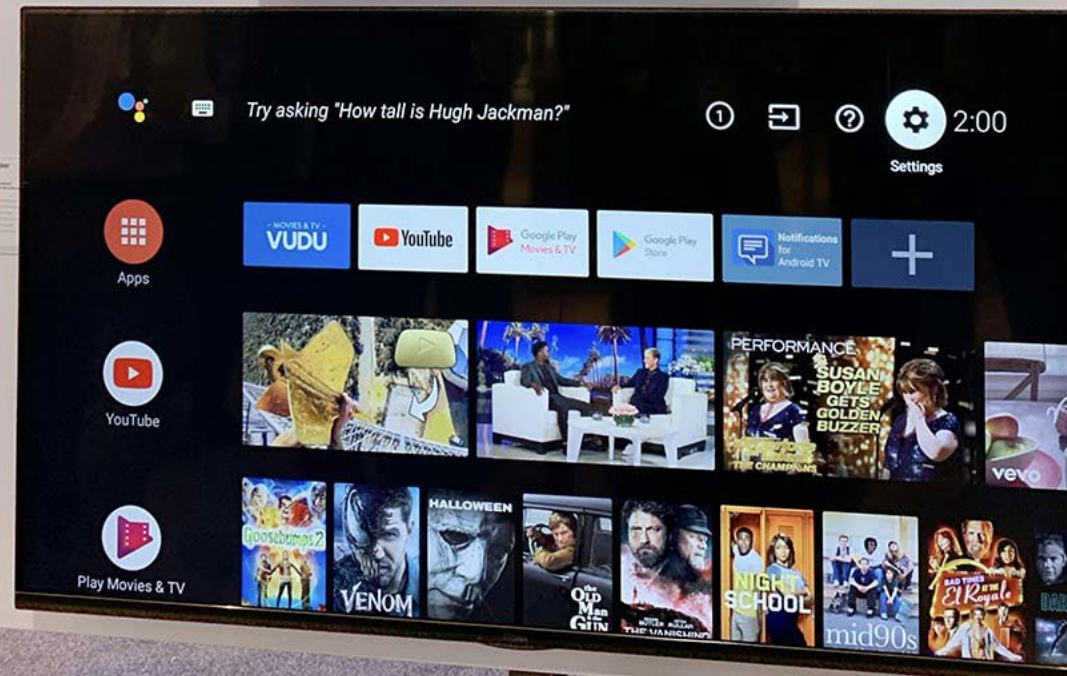


NETFLIX

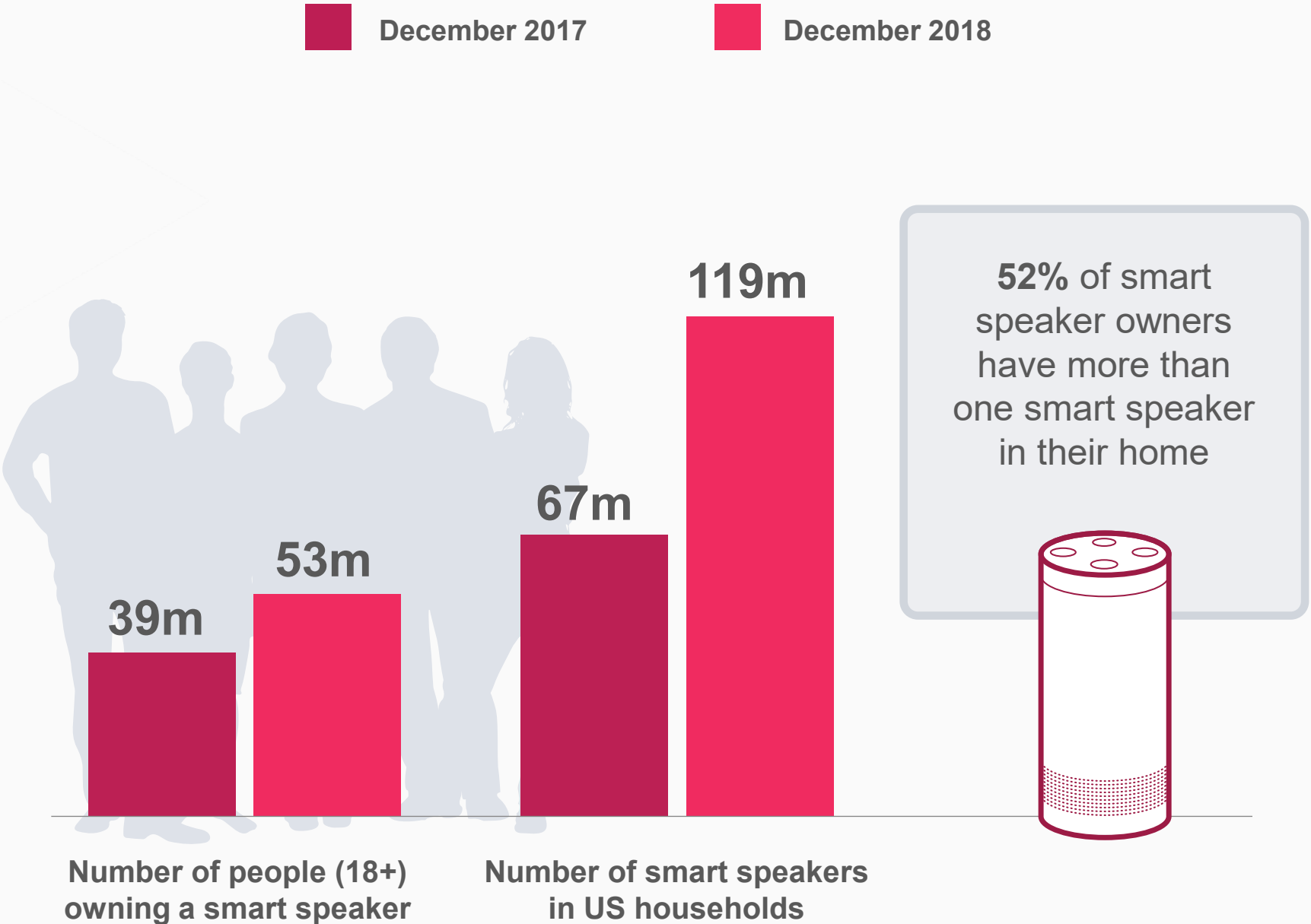
YouTube

Google Play

Netflix streaming membership required.



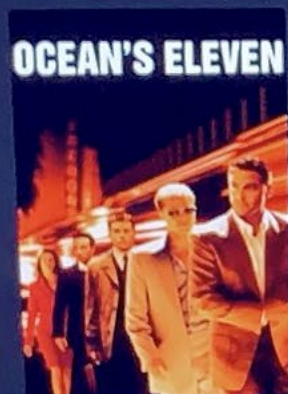
Estimates on smart speaker ownership in the United States



Results for "movies about Las Vegas"



The Hangover
2009



Ocean's Eleven
2001



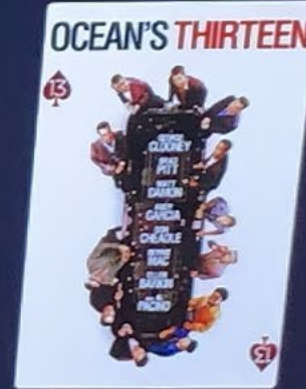
21
2008



Now You See Me
2013



**The Hangover
Part III**
2013



Ocean's Thirteen
2007



**Fear and
Loathing in Las...**
1998



Try saying...

Comedy

Drama

Crime

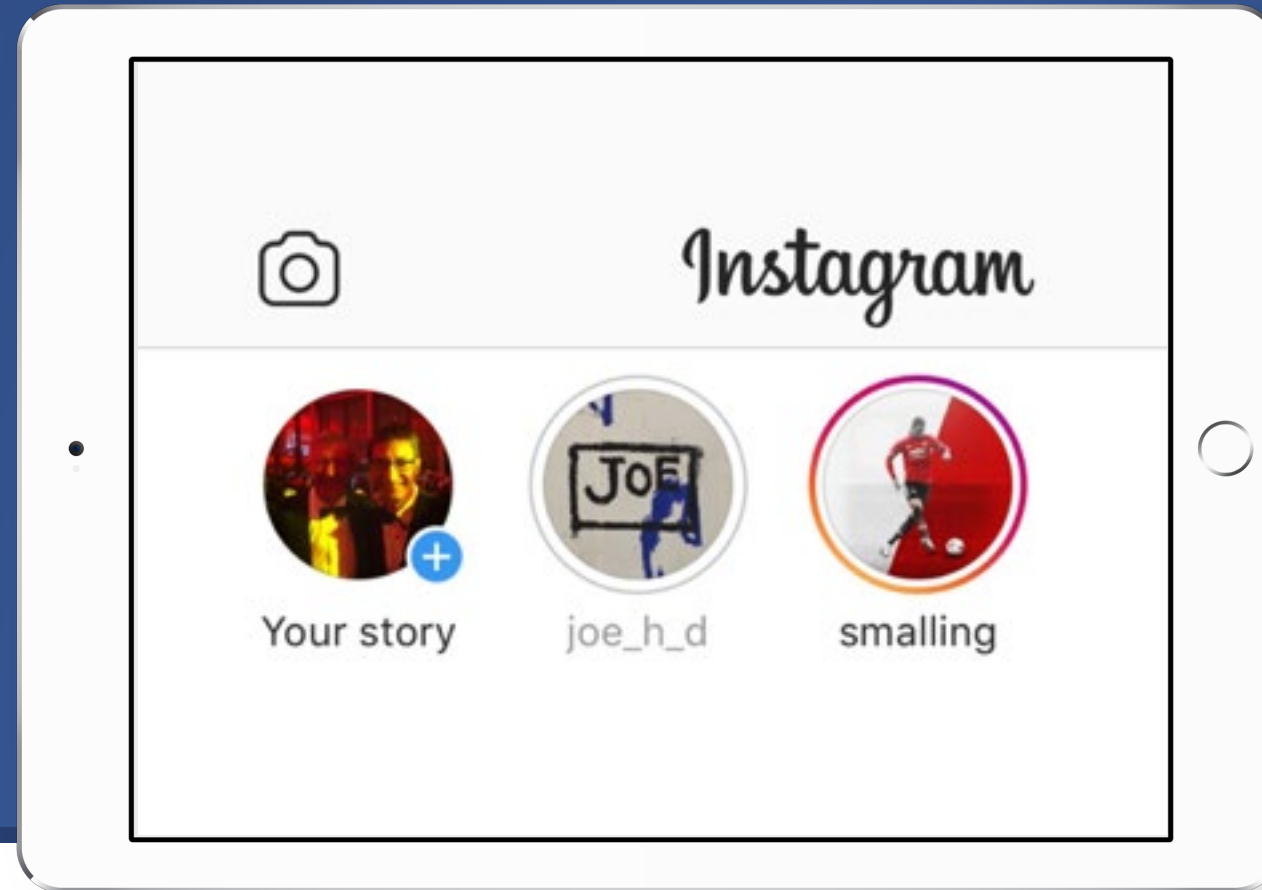
Love

Action

Elvis Presley

SKYWORTH



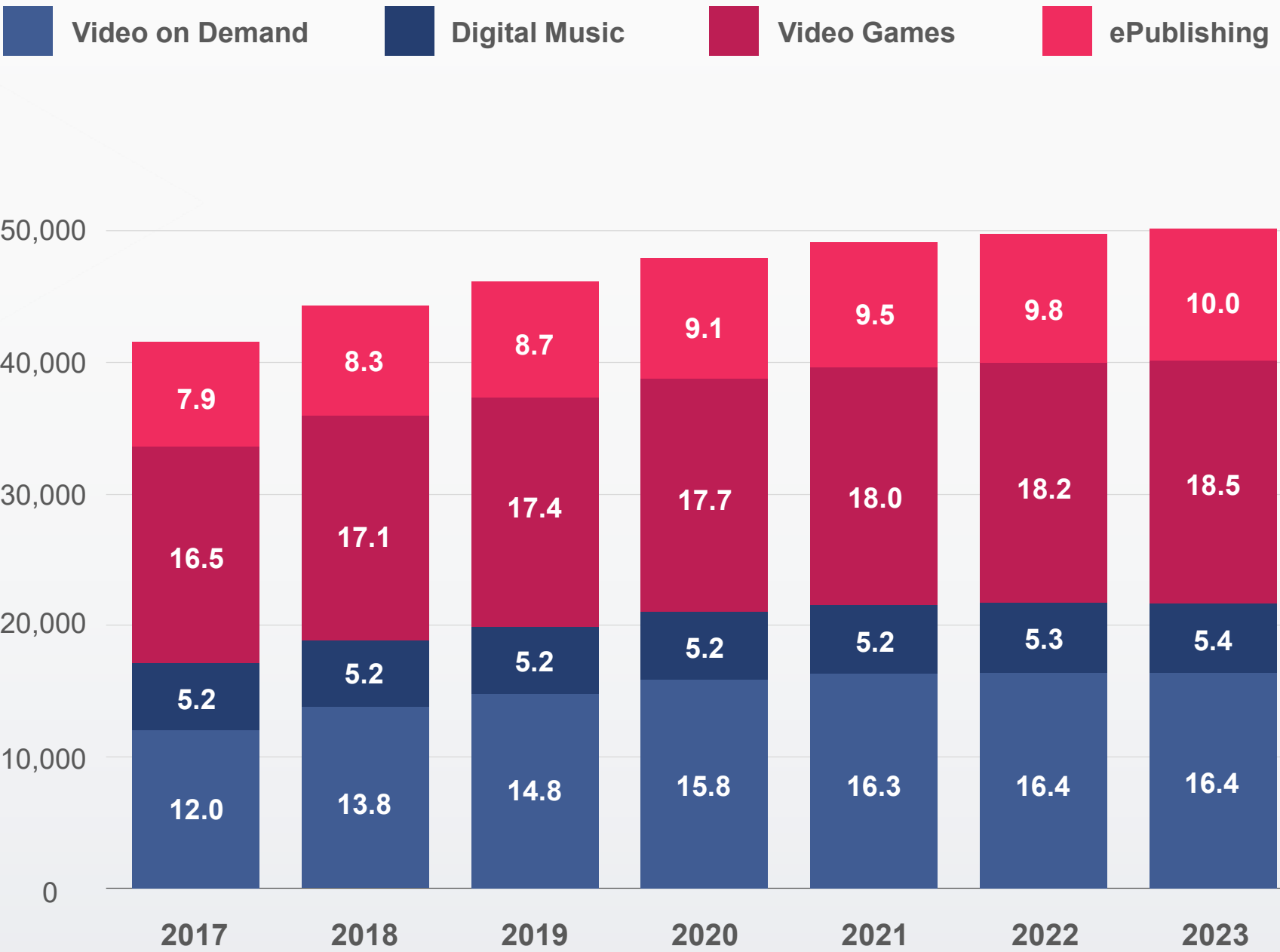


Blindsided by...

Alt Digital

US digital media revenue by segment 2017-2023

(in billions \$USD)

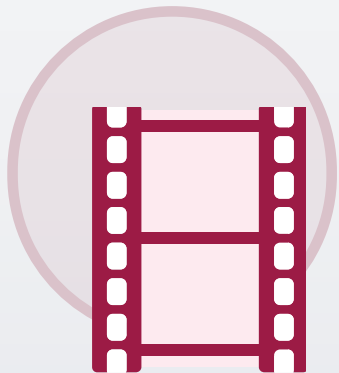
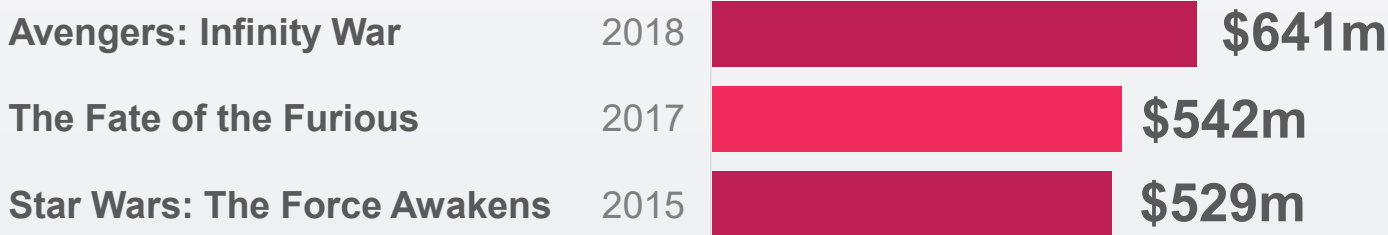


Global launch sales of selected video games compared to the largest movie openings

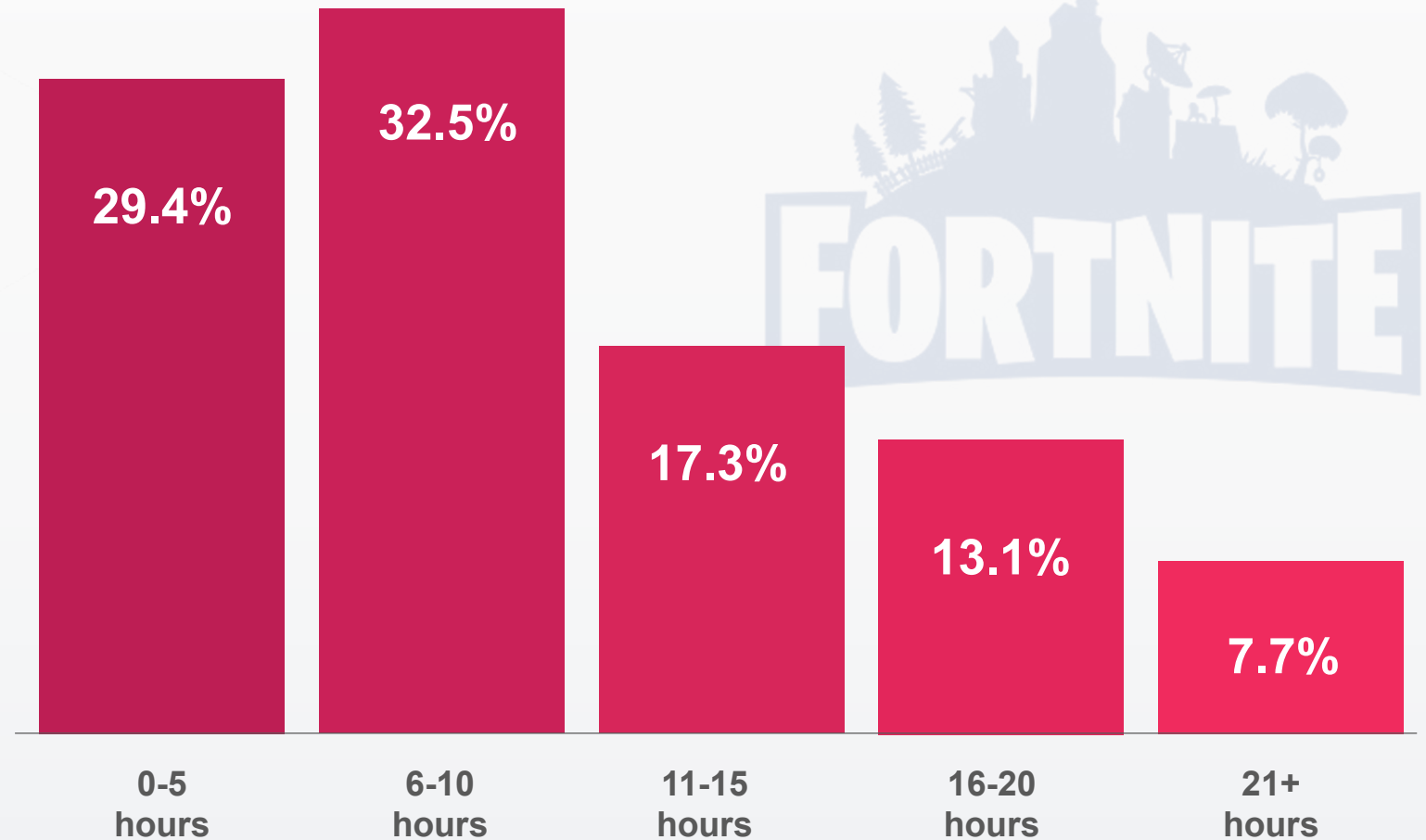
Worldwide retail sales during the first three days after launch



Worldwide box office revenue through the first Sunday after launch

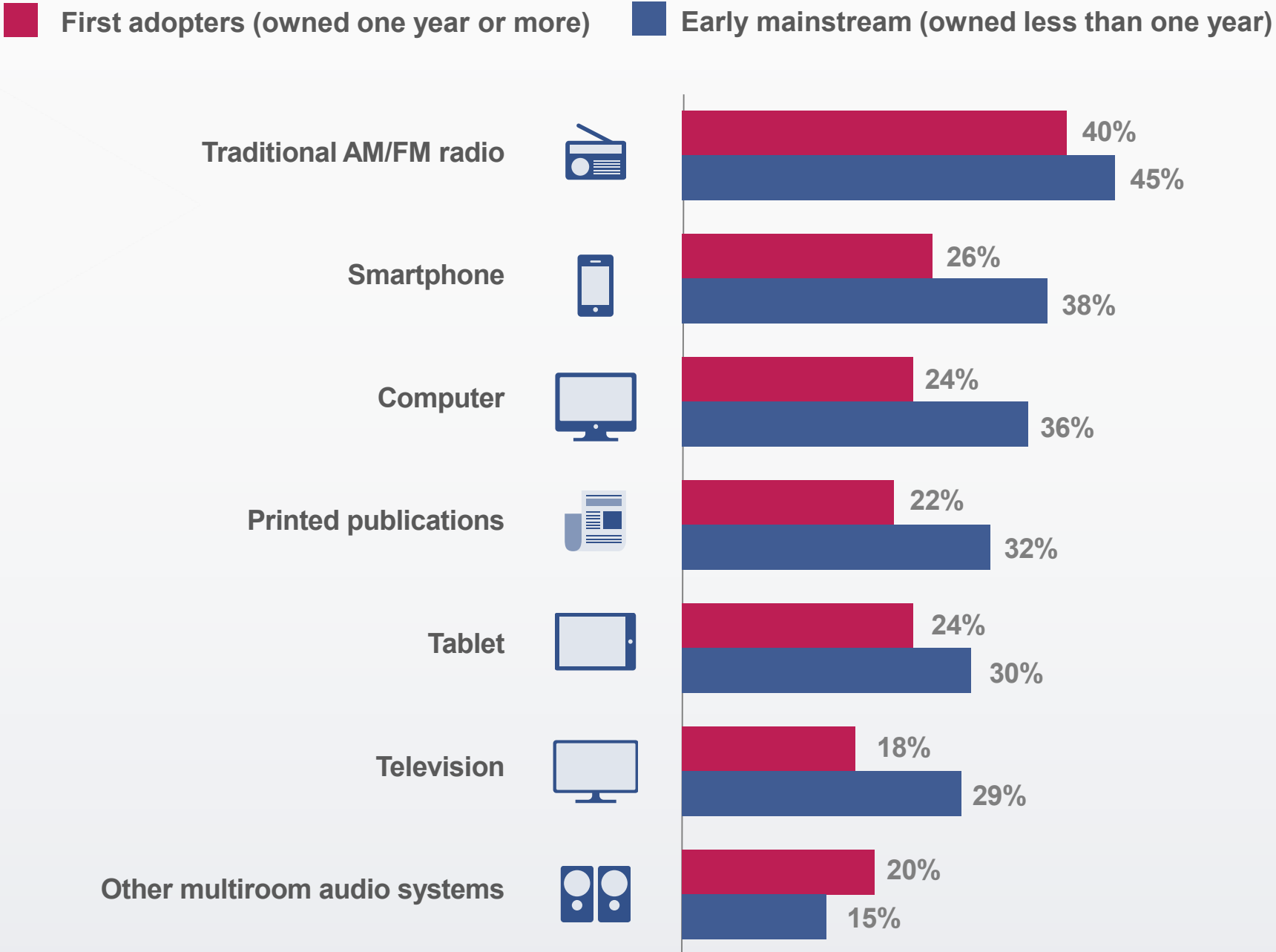


Time spent on Fortnite



Self-reported weekly time Fortnite players in the US spend playing the game

% of US smart speaker owners who replaced time they used to spend with:

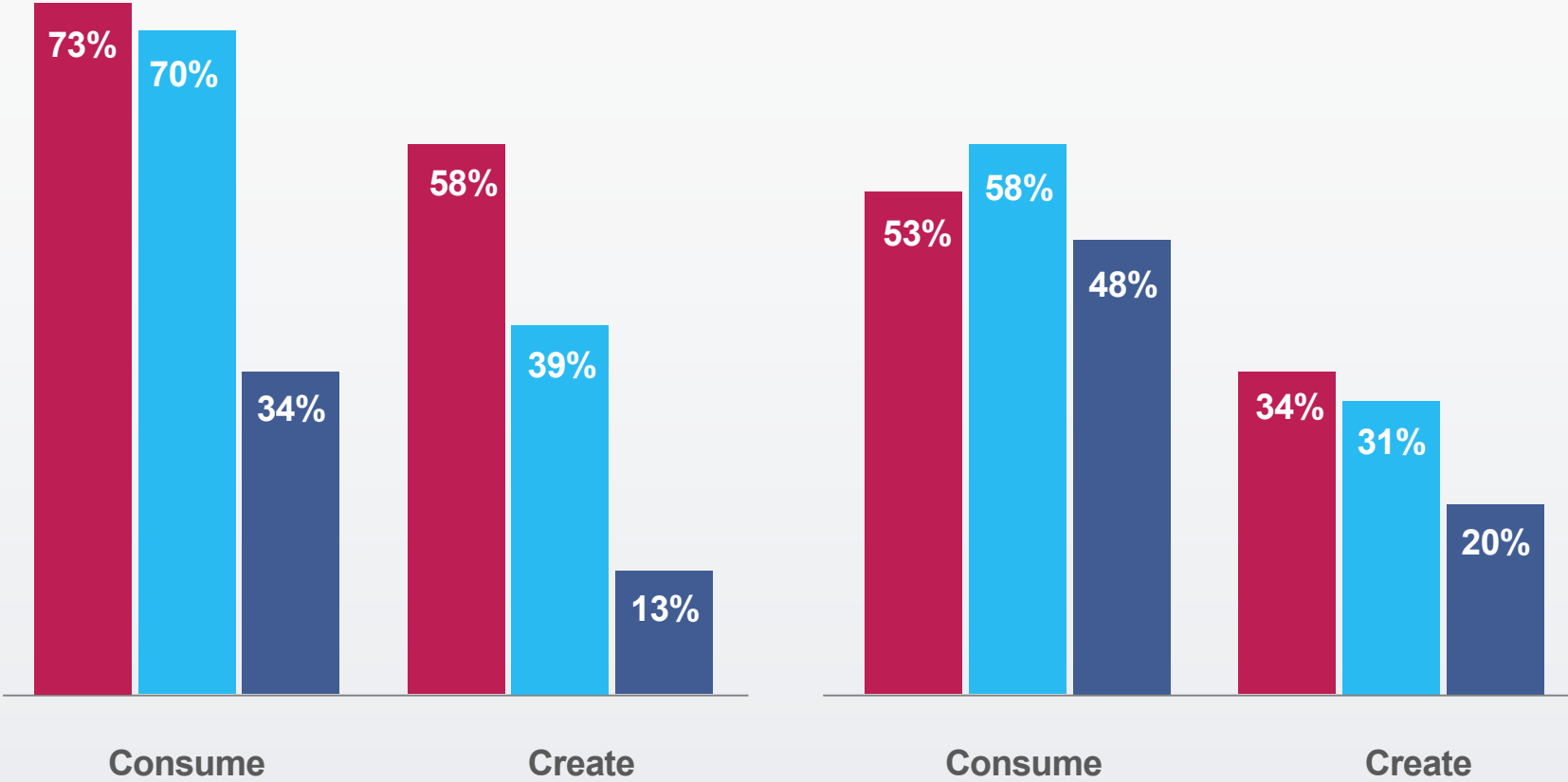


% of Americans
aged 16-34 who
create/consume
stories on
social media
platforms

■ Snapchat ■ Instagram ■ Facebook

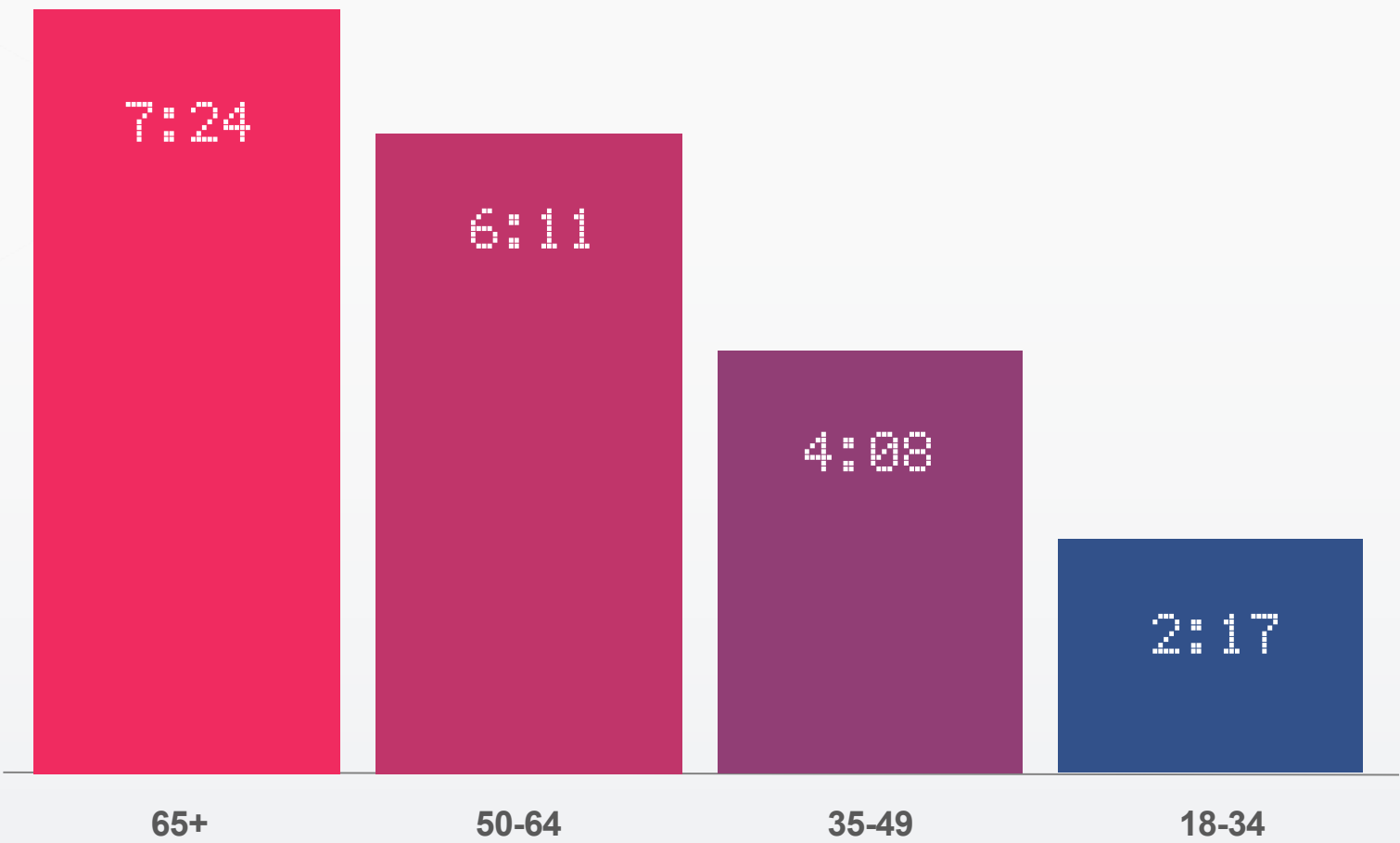
Gen Z
(16 to 24-year-olds)

Millennials
(25 to 34-year-olds)



- Average age of marriage in US
WOMEN: 27 MEN: 30
- Average age of becoming a parent in US
WOMEN: 26 MEN: 31
- Average age of first time managers in US
30

TV consumption



As of Q1 2018

Average daily TV consumption (live + time-shifted)
of American adults, by age group (in hh:mm)

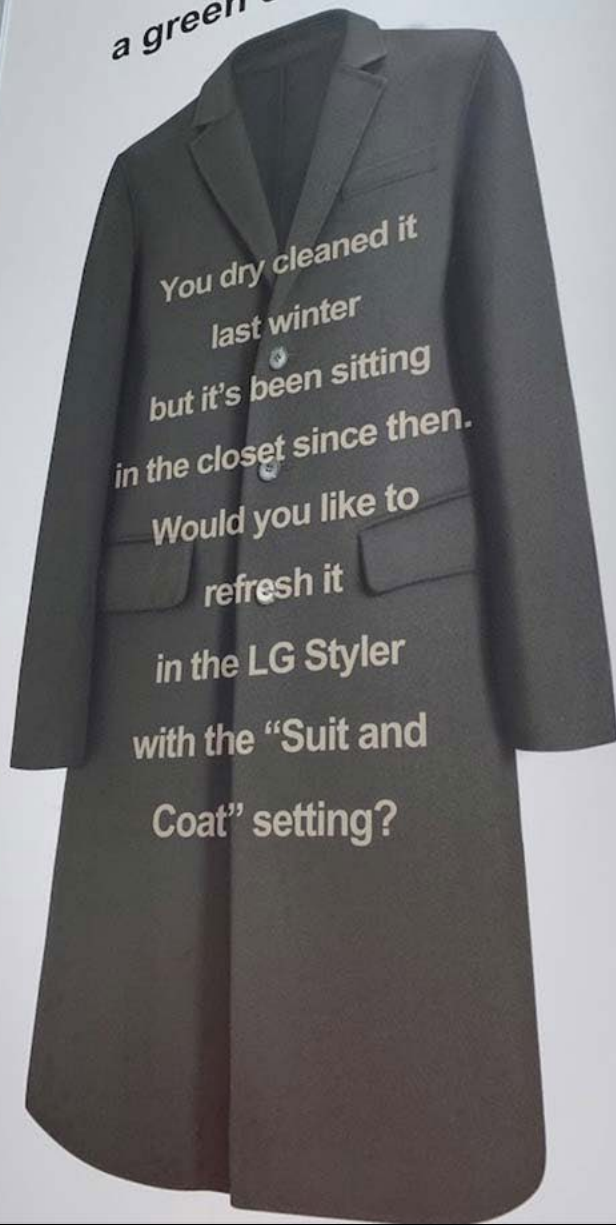


Blindsided by...

Out of Home



What about
a green coat today?



You dry cleaned it
last winter
but it's been sitting
in the closet since then.
Would you like to
refresh it
in the LG Styler
with the "Suit and
Coat" setting?



Carry luggage

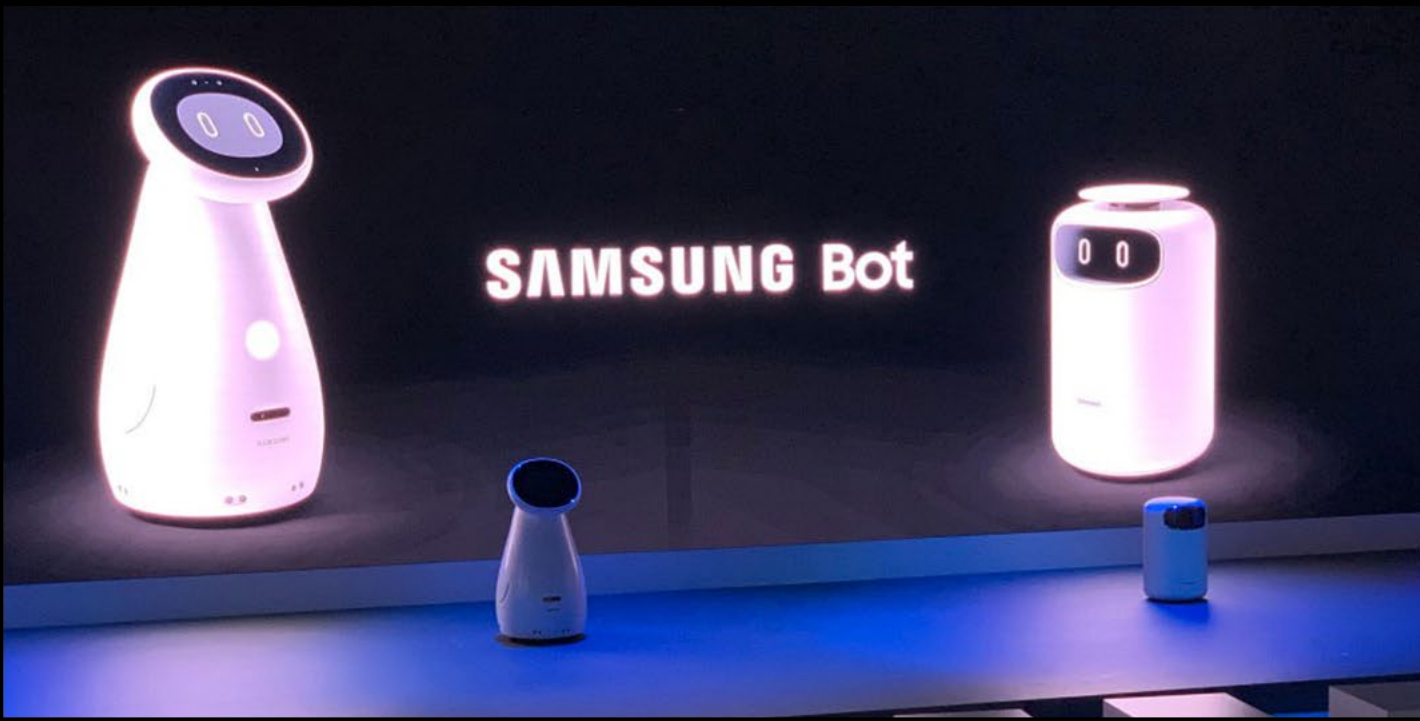


Check-in/out



Guide to the gate





Transformative
Industrial IoT now
on center stage.







This is the age of real 5G.
Made real by Qualcomm.

Qualcomm

Inventing the tech the world loves

Qualcomm

Inventing the tech the world loves

FREIGHTLINER

7-2000



Whale shark

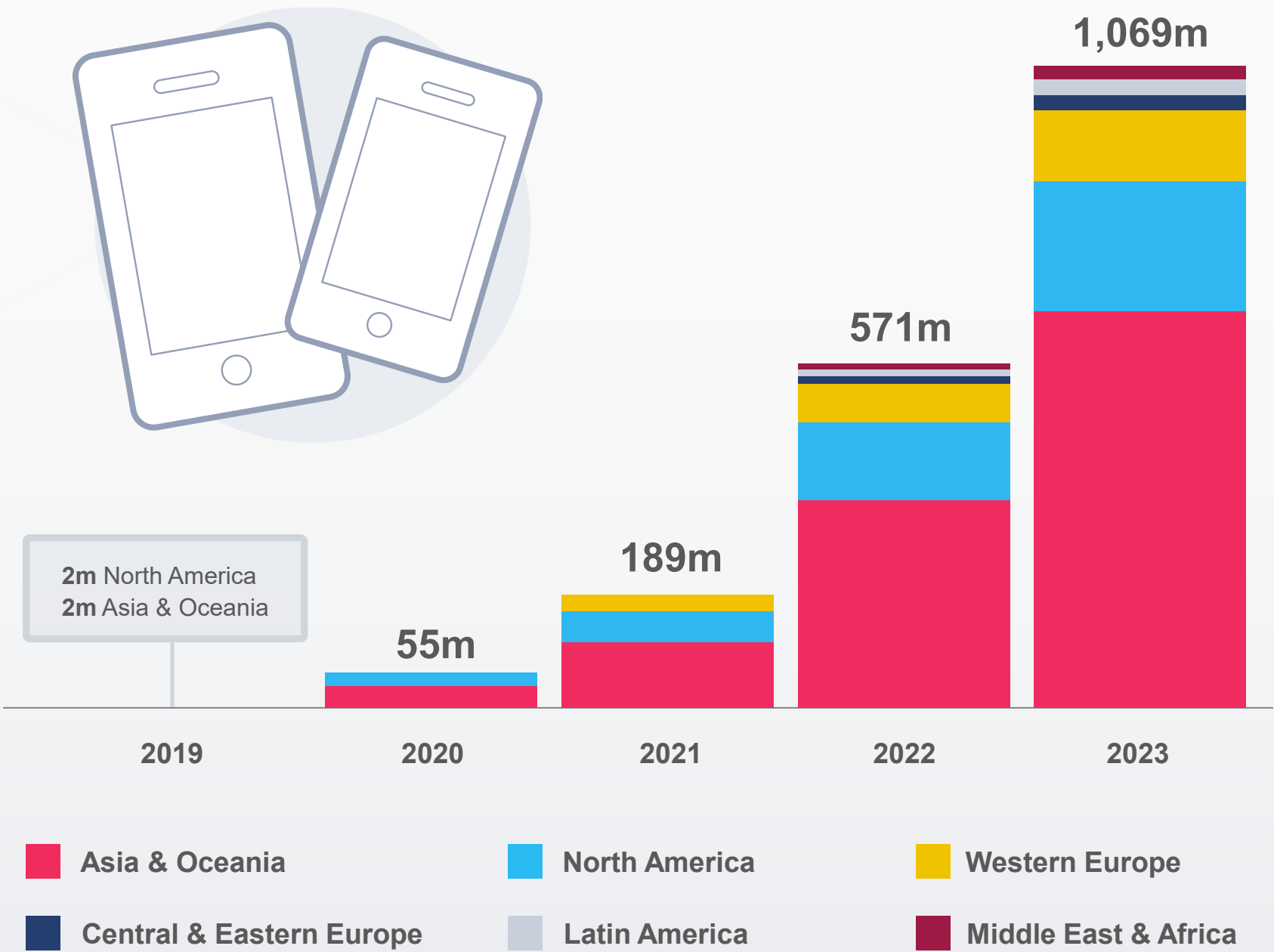


Blindsided by...

China

Estimated number of 5G mobile connections

As of June 2018



DIGITAL MEDIA

■ US digital media market 2019	\$46 bn
■ China digital media market 2019	\$28 bn
■ US VoD ARPU 2019	> \$90
■ China VoD ARPU 2019	< \$4

VIDEO GAMES

- US video game market 2019 **\$17bn**
ARPU c. **\$90**

- China video game market 2019 **\$23bn**
ARPU c. **\$45**

MOBILE SUBSCRIBERS

- USA **0.4 billion** Smartphone penetration **70%**

- China **1.4 billion** Smartphone penetration **52%**
- China will be world's largest 5G market
428m connections by 2025

E-PAYMENTS

- Alibaba's Alipay & Tencent's WeChat Pay each handle more payments in a single month than PayPal's **\$451 billion** a year



Alpha Mini



Hall 2
26000-26199

32-023



Blindsided by...

A Giant





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Blindsided:

The game-changers we might not see coming

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Managing Director, DPP

