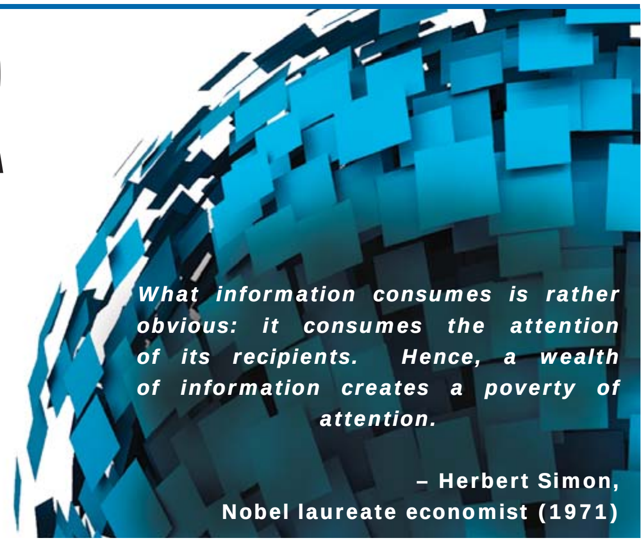
INFERENTIAL FOCUS

BRIEFING

IF 3601 January 20, 2015

THE BATTLE FOR CONSUMER TIME (FORGET ATTENTION):

MARKET STRESSES SPREAD ACROSS SCREENS AND ALL THAT'S ON THEM



CONTEXT & DYNAMICS

Major components of the video/media industry *– screens/devices, distributors and content providers – are converging toward one area of competition: consumer time. That competitive thrust has pushed the various components of that wide-arrayed industry into some version of the Great Restructuring. With more and more manufacturers producing more and more kinds of screens to watch, including computers, televisions, smartphones, game consoles, e-readers and tablets, margins for all are starting to slip. One effect of the expansion of the screen universe is that consumers' time is getting divided, subdivided and spread over several screens, sometimes at once, giving predominance to none. Meanwhile, those who distribute content to consumers are facing more and more competitors, which means that those who enjoyed near-monopolistic power in the past now face serious disruptions in their markets. And finally, content providers, currently enjoying some pricing power, will soon face a market overloaded with competitors, a proliferation of providers creating an endless stream of programs and entertaining trifles, all grabbing some piece of consumer time. To further complicate the picture, regulators are getting involved, seeking to blend multichannel providers, whether online, satellite or cable, and confused players across the industry are starting an acquisition binge. Winners in the pursuit of consumers' time will likely be those who can provide an accurate assessment of how consumers are using all the different devices, how they prioritize that usage and what engages them no matter what device they access. Significant changes are coming in every sector, from screen-and-device manufacturers to all forms of distributors and on to content producers.*

OPPORTUNITIES

- *Any service that can accurately assess how, when and where consumers use all different devices (not just smartphones and computers), including movie theaters, game consoles, radio and television, will be attractive to advertisers.*

- *Any company that sees its way through the market shakeout and consumer shifts will be more valuable for it.*

- *Online multichannel networks (MCNs) and other online properties that have a following will see more and more money come their way, and some will be bought at substantial premiums.*

RISKS

- *The once-invincible cable industry faces real challenges, as its video component continues to leak subscribers while its broadband offerings wax and wane, depending on the provider.*

- *Tech-induced spending – that is, build consumers something new and they will come – could be reaching a plateau.*

- *Margin squeezes, which have already reached the hardware and distributing sectors, could reach the content-production sector soon.*

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All Things Converge

The old breakdown of competition in various consumer communications markets – between broadcast and cable, wired and wireless phones, computers and smartphones, tablets and smartphones or professional and amateur videographers – no longer captures how consumers are using screens, distribution systems and programming.

For years – decades, actually – advertising rates increased for network television, even as the number of people watching those networks was declining. In retrospect, the anomaly of lower market share and higher ad pricing was signaling that significant changes were underway and that much of the video-delivery industry did not understand the significance of the changes.

Now the market is sending signals of other and more expansive changes.

◆ Every day, Americans spend five hours watching a screen that is **not** television. In the third quarter of 2014, the per-person average time spent in television viewing declined 13 minutes, while the average time spent on Netflix increased 12 minutes. (*Variety,* 11/11/14; *Advertising Week,* 10/27/14)

◆ In April of 2014, for the first time, a majority (57 percent) of ESPN viewers accessed the sports network via smartphones or tablets. (*Advertising Week,* 9/29/14)

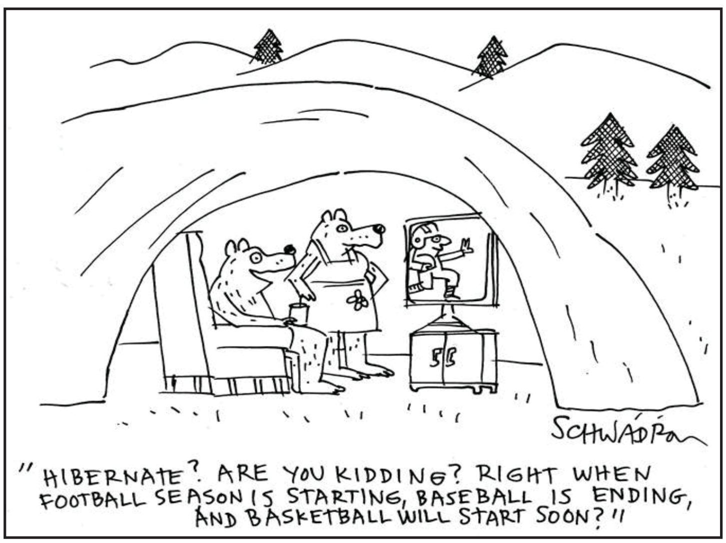
◆ In 2013, cable distributors lost 250,000 subscribers, the first annual decline on record. (*The Week,* 12/5/14)

◆ In the third quarter of 2014, cable companies attracted 798,000 new broadband subscribers, a 3.8 percent increase and the largest percentage uptick in two years. (*New York Post,* 11/7/14)

◆ Every minute, more than 100 hours of new video are uploaded to YouTube. (*Economist,* 12/6/14)

◆ Amazon's original series, *Transparent,* won the Golden Globe award for best television comedy, becoming the first streaming service to win such an award in the TV category. (*New York Times,* 1/14/15)

The old breakdown of competition in various consumer communications markets – between broadcast and cable, wired and wireless phones, computers and smartphones, tablets and smartphones or professional and amateur videographers – no longer captures how consumers are using screens, distribution systems and programming. The once-discrete markets are converging toward one generalized arena in which all players battle for consumer time. They are competitors for the same target, and moreover, they are competing with movie theaters, concert halls, streaming-music and online-shopping sites, books (e-books and print) and even restaurants for that time, although young people actually choose restaurants based on whether or not they have free Wi-Fi. Such widespread, multidimensional competition has ignited heated battles in the video arena in three areas: Screen Scrambles, Distributor Disruptions and Content Congestion, as every contender tries to secure a place and salvage margins in an unsettled market.



Screen Scrambles

As individuals get more comfortable with so many devices, they are beginning to figure out when to access each device for the most desirable and beneficial end use. Individuals have one device in their pocket, another at the office and several more at home, and they are still in the process of developing behavioral patterns of use that assimilate (or reject) the various screens into their daily routines.

◆ In September of last year, one-third of those under age 34 watched television series on their smartphones, while just five percent of those over 55 did. Yet 66 percent of millennials and 90 percent of those over 55 spent more time watching television sets than any other device. Meanwhile, 65 percent of those surveyed watched Netflix videos via Internet-connected TV devices, gaming consoles or Blu-Ray players. (*Variety*, 10/21/14)

◆ Smartphone owners check their phones from 100 to 150 times per day. (*Bloomberg BusinessWeek,* 11/10/14)

"I'm looking for something that will really wow her should she happen to look up from her phone."

The fallout from shifting consumer uses of various screen devices has put pricing pressure on some of the suppliers. Computer prices, for instance, have been dropping. Last year, Lenovo became the world's largest seller of computers, upping its revenue to $39 billion, expanding sales by roughly 20 percent per quarter and cutting prices across the board. Other companies, such as Microsoft and Asus, have produced low-priced computers. Industry observers had anticipated that consumer sales would decline by roughly seven percent each quarter, but by lowering prices, the industry managed to keep the overall sales figure flat from the year before. (*Bloomberg BusinessWeek*, 11/10/14)

Television manufacturers have likewise been facing stressful times. Last year, 34.5 million flat-screen televisions were shipped in the U.S. alone, yet that is down from 40 million in 2010. Special add-on devices for TVs, such as Apple TV (more than 20 million shipped), Roku (more than 10 million shipped in the U.S.) and Android TV (just issued in June 2013), have helped keep television makers from losing even more sales. Nexus Player, which complements Android TV, supports a variety of video-streaming apps, doubles as a gaming platform and enables a viewer to cast content from Chromebooks as well as Android and iOS smartphones and tablets directly to a television screen. (*Multichannel,* 10/20/14)

Smartphones, like computers and televisions, are facing a changing landscape, as more and more manufacturers, especially in China and India, affect global market prices. Xiaomi, to take one example, is working toward introducing its $150 smartphone into U.S. markets. Already, the average price of unsubsidized smartphones in the U.S. declined from $335 in 2012 to $314 in 2014. Even the hot iPhone dropped from an average of $652 in 2011 to $607 in 2013. Walmart announced it was lowering the prices for Apple's iPhone 6 and 6 Plus by $50 and Samsung's Galaxy S5 by $60. Globalizing competition hit Samsung rather quickly, as its third-quarter profit was its lowest since 2011. (*Bloomberg BusinessWeek*, 11/10/14; *Forbes*, 12/13/14)

The game-console market also faces pricing pressures. To push its products, Microsoft was forced to remove the Kinect device from its Xbox One and then lower the price by $100. While Sony insisted on holding the line on its price, retailers this past holiday season had to bundle an array of games with the Playstation 4 to maintain sales. Microsoft paid $2.5 billion for Minecraft to develop better games for the Xbox, confirming that the hardware sector of the gaming industry is heavily dependent on help from game producers to keep its sales moving, similar to the way popular programs help retain viewers for television. All of the consoles benefit from being able to connect to the Internet. For that reason, Playstation announced it will start producing original programming for its online audience. (*New York Times*, 1/5/15; *Variety,* 11/18/14)

Connecting to the Internet has Amazon hoping that the upgraded Kindle Fire will sustain sales of a screen the

Despite so much talk about this screen or that, the reality is no screen dominates consumer time.

company originally made for book reading. Meanwhile, Barnes & Noble pulled away from its Nook book-reading device because of weak sales.

Despite so much talk about this screen or that, the reality is no screen dominates consumer time. The screens in consumers' pockets get the most looks per day, perhaps because they are so accessible, but the large screens in the den still get the most time, even though they have to share that time with other devices used by multitasking viewers. Cross-currents of viewing suggest that individuals are still piecing together their screen lives. Internet on the television, small-screen gaming, multiscreen interactive viewings, screen-based book reading, shopping on a book-reading device, smartphone "television" and game-console streaming – these are just a few of the cross-market ways consumers are configuring their screen routines. In short, device manufacturers are shooting at a moving target.

"We're all together watching television, but we're not all watching television together."

Distributor Disruptions

With viewers using so many different devices in their entertainment environment, the system put in place decades ago faces serious challenges. Distributors continue to confront competition from their known rivals, and that ongoing reality led wireless companies Verizon, AT&T, Sprint and T-Mobile, for instance, to collectively lose $45 billion in value in November alone, mostly because of a price war. (*The Week*, 12/26/14)

Beyond traditional competitors, companies that seek to deliver content to various screen devices must compete across venues for consumer time. That is disrupting the market in three different ways: Shifts in Consumer Preferences, Restless Content Producers and a Splintering System.

Shifts in Consumer Preferences – As mentioned above, cable networks have been losing subscribers for their video services, even as some have been increasing their subscriber base for broadband. In 2013, Cablevision lost both cable and broadband subscribers (broadband subscriptions fell by 23,000), but the cable provider managed to report a six percent increase in broadband revenues because it raised prices. Time Warner Cable and others even increased the leasing fees for their modems, jumping them by as much as 33 percent. Meanwhile, broadband subscriptions at Comcast expanded (to 21.6 million) and its video subscriptions shrank (to 22.4 million) to the point where Comcast could have more broadband customers than traditional cable customers in the not-too-distant future. Already, more than a quarter of all calls to cable networks nationwide are requesting Internet-only service. Many of those requests are likely made by so-called cord cutters, who have either never had cable or who have severed relations with a cable system, a group which by the middle of last year had reached 7.6 million households, up 41 percent in three years. [Therein lies one reason cable companies want to undo what is called net neutrality, because they would like to charge broadband customers more for switching their viewing habits from cable to broadband.] (*New York Post*, 11/7/14; *CNN Money*, 1/2/15; *Venture Beat*, 12/13/14; *Reuters*, 4/19/14)

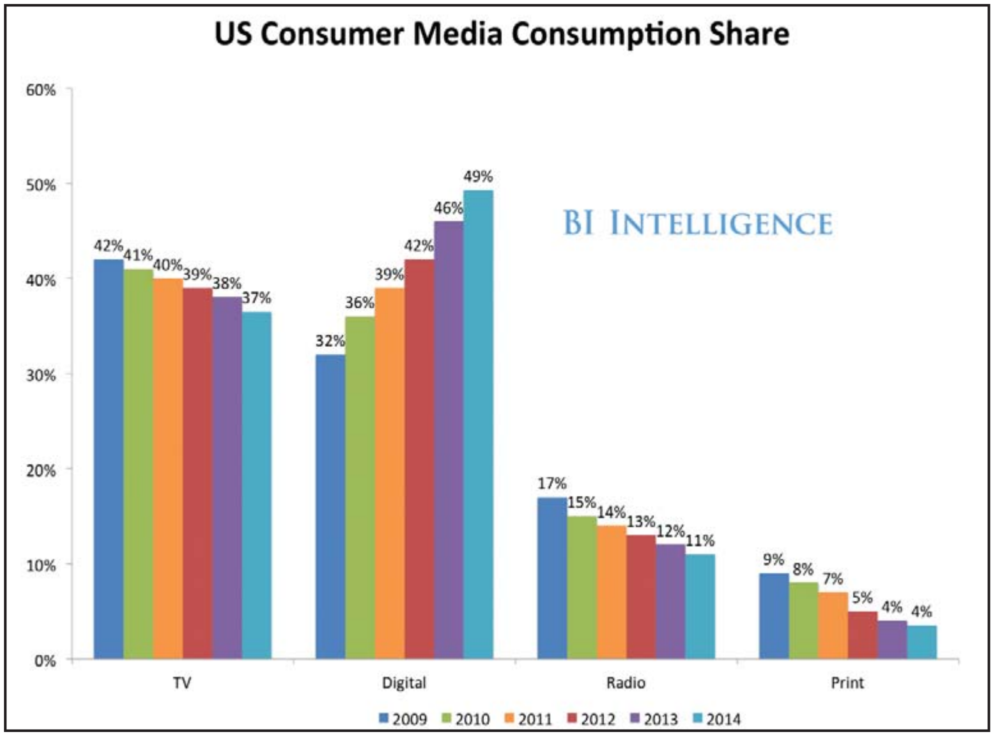
Consumers seem to be playing around with the options they have as to how they access the content they want. For instance, **58 percent** of those between 50 and 59 years of age with cable subscriptions also have subscriptions to Netflix, up from just **19 percent** one year earlier. In addition, last year, viewers watched **six billion** hours of YouTube video **per month**, and 30 percent of surveyed American adults said they get their news from the social-networking platform Facebook. (*Billboard,* 11/22/14; *Christian Science Monitor*, 11/10/14)

Restless Content Providers – Content providers have started to assert their position against cable and satellite distributors, principally because they now have alternative pathways to consumers. CBS networks and Dish Network, for instance, had a six-month quarrel (and a 12-hour blackout) over the price CBS wanted to charge Dish for delivering the company's many channels in 14 different markets. Dish did pull the plug on several regional sports stations, including Boston Celtics' distributor Comcast SportsNet New England, while DirecTV dropped SportsNet L.A., the station that broadcasts Dodgers' baseball games, all because the price demands of those content providers exceeded what the satellite companies could afford or believed to be profitable. In October, Suddenlink, a mid-sized cable operator in the Midwest, dropped Viacom's suite of 24 channels, including MTV, Comedy Central and Nickelodeon, from its system. Dish threatened to drop Turner Broadcasting's group of channels, including TNT, TBS and CNN, unless the company lowered its price. Also, DirecTV said it would drop AMC for the same reason. (*New York Times*, 12/7/14; *Variety,* 11/4/14 and 11/11/14)

While content providers want higher prices from their distributors, they are also moving to connect directly to consumers. CBS and HBO, for example, announced plans to offer their programming to customers without cable subscriptions. Also, John Hendricks, founder of the cable channel Discovery, recently left the board of the company he started to launch CuriosityStream, a subscription video-on-demand streaming channel. (*Wall Street Journal*, 1/14/15; *Christian Science Monitor,* 11/10/14)

A Splintering System – The CBS and HBO examples highlight another point: the aggregated system that has been in place for several decades seems to be coming apart, and new kinds of competitors keep appearing. For example, Sony and Verizon have struck deals with companies such as Viacom to fill the station load for their upcoming media-distribution models, with Sony using the Internet as its distribution vehicle and Verizon focusing on wireless distribution. (*Variety*, 11/4/14)

A more challenging example came from one of the distributors. The satellite-based Dish Network launched Sling TV, which for $20 per month will enable subscribers to stream ESPN, ESPN 2, the Disney Channel, HGTV, the Food Network, the Cartoon Network, CNN, TNT, TBS, the Travel Channel, Adult Swim and the "best of Internet videos" from Maker Studios, all with **no cable or satellite subscription**...just a broadband connection. The service will be available for Xbox One, Roku media streamers, all personal computers, Amazon Fire TV, Fire TV Stick and all iOS and Android smartphones and tablets. (*CNET*, 1/5/15)



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Content Congestion

The Screen Scramble and the Distributor Disruptions might seem to be moving market leverage toward content providers, and that possibility has been encouraging content producers to demand higher prices, as indicated above. And, indeed, value has accrued to several influential and popular content providers for the Internet. But even there, so many suppliers are surfacing that the mere volume of available content could lead to problems in aggregating a sufficient audience to warrant profitable amounts of advertising and/or subscriptions.

The costs that cable and network stations pay to get access to popular content (*e.g.*, sports and special events) are also increasing and forcing those channels to turn around and seek price increases from distributors, who, as just noted, are getting testy themselves and shutting out "overpriced" providers. The elbowing is getting harder and riskier.

Here are a few of the examples driving stresses and squeezes in the content area.

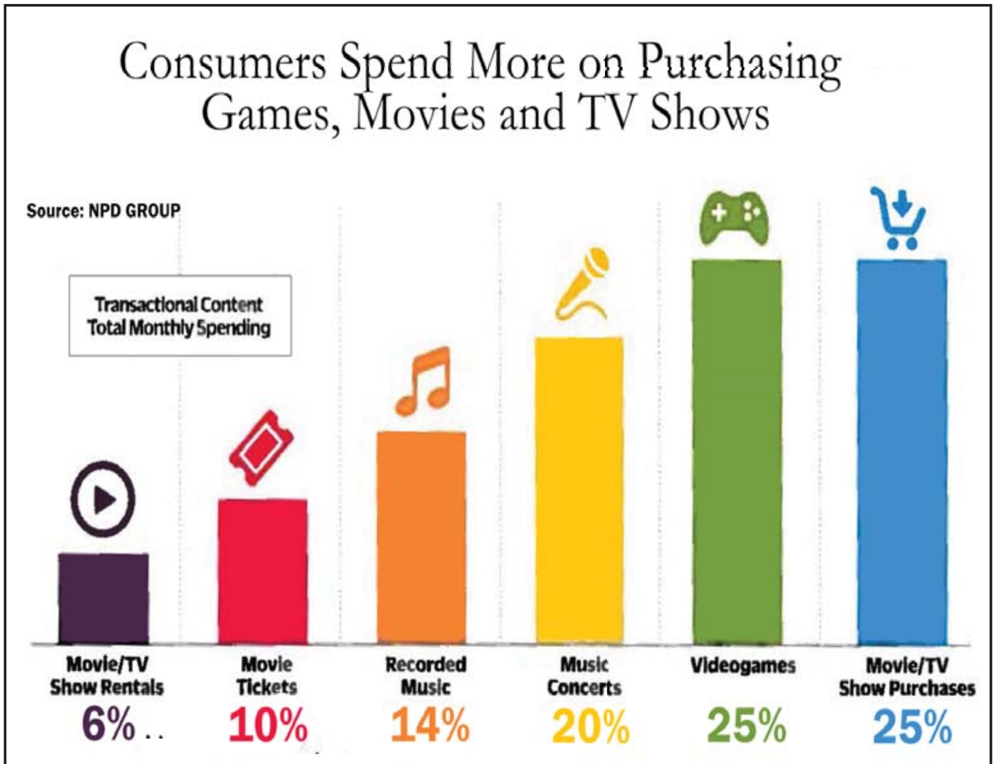
◆ Disney's ESPN and Time Warner's Turner Broadcasting System (TBS) just paid a record $24 billion over nine years for the rights to broadcast NBA games. Shortly thereafter, TBS announced its largest layoffs in recent history, cutting a total of 1,500 employees from its payroll. (*Variety*, 10/14/14 and 11/4/14)

◆ Disney, which paid at least $500 million in 2014 for Maker Studios, an online studio that produces content for YouTube channels, will soon make some of its most valuable properties, including Star Wars and Marvel characters, available to Maker to generate YouTube content. (*Redef*, 12/15/14)

◆ The Young Turks, which had roughly 37 million monthly views, expanded into a multichannel network offering 35 different channels that covered everything from news and sports to technology and college life, thereby upping its views-per-month to 75 million. (*Pundo Daily*, 10/31/14)

◆ In October 2014, the top three non-music video multichannel networks uploaded anywhere from 2.6 to 4.5 billion minutes of content each. (*ReDef*, 12/15/14)

◆ Condé Nast, the publishing giant, is entering the video field, with multiple contracts to make movies and television shows from the content provided in articles the company has published. At present, it has contracts for 12 motion pictures and three television series. In addition, the company uses its content to fill 11 magazine-branded Internet channels across 25 platforms and will launch three more this year. Time, Inc. will also be converting its news and feature content into online video. (*Adweek*, 6/30/14; *Variety*, 11/4/14)



Source: *Variety*, 11/25/14

More and more companies are entering the content arena. Small production houses are in demand, but channels are proliferating so rapidly that they are starting to eat away at each other's market share. Taken together, these observations reveal a changing and still unclear sense of value. Content Congestion is just starting to become apparent, and that congestion is starting to affect content providers.

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◆ Two of the most expensive stations in terms of cost per subscriber, ESPN and TNT, lost nearly five percent of their subscribers in 2013. (*Wall Street Journal.* 10/14/14)

◆ For the third quarter of 2014, C3 ratings (that is, original program presentation plus three days) among adults 18 to 49 years of age declined eight percent, with steeper declines registered at A&E networks (down 22 percent), the NBCUniversal cable cluster (down 14 percent) and both Disney's cable stations and Time Warner stations, including TNT and TBS (down 13 percent). (*Variety,* 11/4/14)

While the overload has been around for a while, one thing has obscured the crowding: the proliferation of time. Roughly 77 percent of American TV viewers use another digital device while watching television. That is, "time" is multiplied by the number of devices in use simultaneously. (*Guardian*, 12/15/14)

To take that a little further, consumers have spent time on their smartphones, televisions and computers all at once, thereby creating triple the amount of "time" they could spend with media – although their attention to any one device is questionable. But now, available content even for that expanded concept of time is getting congested.

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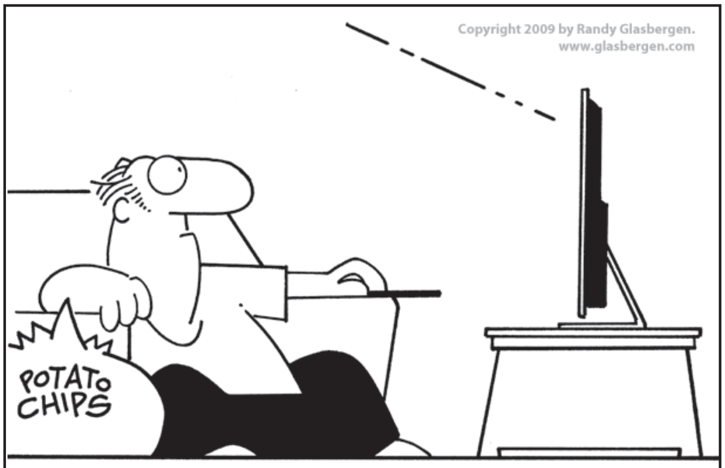

"Now the award for Best Supporting Actor in a YouTube Video based on a Twitter, Facebook comment or blog. And the nominees are..."

Clarity and Concentration

Screen pricing is declining, distribution numbers are declining in some areas, and content providers are proliferating. Everyone involved is seeking the Holy Grail: consumer time. Those seeking to attract consumers to their media offerings face an uncertain future, because consumers themselves have yet to settle on a media pattern – when to use which for what? In addition, the Federal Communications Commission (FCC) has under consideration a change in policy, altering the rules that have been in place for years and making equal in the economy all cable, satellite and online multichannel providers. Thus, online distributors, such as YouTube and its MCNs, will be considered the same as cable and satellite companies. (*Los Angeles Times*, 10/30/14)

One response to the confusion has been the sudden eruption of mergers and acquisitions, as companies, perhaps lagging the pace of market change, seek to keep abreast of new realities by buying innovation. Prices have been increasing substantially. For instance, in 2013, DreamWorks Animation paid $33 million for AwesomenessTV, a YouTube network. In December 2014, Hearst bought a 25 percent share of AwesomenessTV from DreamWorks Animation for $81.25 million. Or consider StyleHaul, whose various channels focus on fashion and have 199 million followers. It recently sold for $150 million to RTL Group, which hopes to sell products to StyleHaul's followers. (*Tech Crunch*, 12/23/14)

In 2014, companies spent more than $2 billion on small-to-medium-sized production houses, as the M&A wave hit the studio area. Discovery Communications and Liberty Global spent $930 million to buy All3Media. Companies such as ITV Studios, Tinopolis, Time Warner, NBCUniversal and MGM bought tiny production companies, such as Leftfield Entertainment, Magical Elves, Eyeworks and One Three Media. In most cases, the buyer was seeking talent that can effectively deal with the new media environment. (*Variety*, 12/9/14)

Perhaps M&A activity has caught investors' attention, because money is starting to flow into media companies. For instance, Vox Media, a publisher of online lifestyle and news brands, received $46.5 million of financing from General Atlantic, a New York investment firm. BuzzFeed, a news-and-entertainment site, raised $50 million in new financing, thereby putting the company's value at $850 million (by way of comparison, Jeff Bezos bought the *Washington Post* for $250 million). These investors, of course, are focused on the text-based sites, and they believe the restructuring taking place at that end of the consumer online market will result in, what one called, "a huge amount of value creation." Such

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perspective is likely to spread across online content areas. (*New York Times*, 12/1/14)

Whether the M&A wave keeps traditional players in the game through this era of industry restructuring, a larger question remains central: How are consumers assimilating different technologies and what are they likely to do in the near future? Seeking answers to that question has prompted a gold rush to those who claim they can accurately monitor consumer behavior across all devices, systems and content.

"Hold on, I'm going to conference in my wrist."

The ability to monitor how consumers navigate through various media, screens and content – not just smartphones and computers, for instance – will become more valuable. One contender for this broader tracking, Rocket Fuel, is one of the largest programmatic advertising platform agencies and claims it can monitor individual consumers across multiple devices, specifically, laptop to smartphone to tablet. From accumulated evidence, the company can decipher what online surfing habits an individual has. Such "cross-device optimization" produced $240 million in revenues for Rocket Fuel last year. (*Venture Beat*, 10/4/14)

Rocket Fuel's missing piece of information is how consumers integrate television into their media habits, what content they watch across several devices, whether their choice of medium varies based on content and how screen and sound capabilities affect those choices. But just getting a hold on how consumers move across digital devices could help media companies (and their advertisers) get beyond the market confusion they now face. Yet all of this does not even take into consideration the consumer time eaten away by various streaming music services, such as Spotify, Pandora and Beats, as well as other kinds of devices, such as game consoles and e-readers.

The ability to monitor how consumers navigate through various media, screens and content – not just smartphones and computers, for instance – will become more valuable.

The use of apps to measure viewer activity has recently returned to favor. Viggle, which has a million active users, and Beamly, which has four million active users, seek to exploit the data they accumulate on the viewing habits of their clientele. Viggle has a deal with DirecTV to enable that satellite company's subscribers to win points for loyalty while Viggle compiles statistics on what those viewers do while watching TV. The company's president and chief operating officer, Greg Consiglio, explained, "We know what our users watch, listen to, the brands and ads they engage with and what they redeem." (*Advertising Age*, 9/29/14)

TARGETED ADVERTISING

Time Takes All

Measuring consumers' behavior as they move among devices, access points and content will need to be a dynamic enterprise, mainly because consumer behavior is unsettled. Consumers as users of these media have yet to decide how they will be using the different screens for different content and who they will prefer to give them access to that content.

Overall, industry shakeouts, company consolidations, market-share battles, pricing pressures and also some unique opportunities will be surfacing simultaneously in the near-to-medium term.

Screen companies seem to be in a race to the bottom, starting to change from offering more and more complex products with more and more capabilities to offering devices with only the most useful features, at lower prices. For instance, Google, recognizing such a shift in smartphone manufacturers, recently introduced Android One, a version of its operating system that permits smartphone manufacturers to make cheaper phones that still use Google's system and standard apps. More and more device manufacturers and software providers will likely need to shear off excess gadgetry and capabilities to facilitate a downward direction in device pricing – that is, create lower-priced products...or take smaller margins on existing products and services.

In the not-too-distant past, cable companies enjoyed a monopolistic access to video consumers. With the proliferation of access points, that monopoly has turned into a competitive dogfight, with wireless networks, satellite systems and broadband networks (phone and cable) offering alternatives. Cable companies have managed to hold on to profits by increasing prices. Eventually, that good fortune will run its course, and pricing competition will create margin troubles for everyone. Disruptions in the distribution arena are likely to be significant.

The content arena is enjoying high demand at the present. It has what each distributor needs in order to be unique and to sustain margins. But the proliferation of content is starting to show through, creating contests for viewers, followers, friends and every other derivation that essentially comes down to... consumer time.

As things tighten up in the content arena, inexpensive production and well-known products or brands could help production houses survive the stresses. In the first instance, Comcast's NBC Universal recently signed a deal with Blumhouse Productions, known mostly for low-budget horror films, to produce a program series, at its own expense. If NBCU eventually buys the series, it has agreed to pay $500,000 per episode. Moreover, if the series becomes a hit, then Blumhouse will share in the profits. That kind of arrangement between production house and programmer could become commonplace in the months and years ahead, as pricing pressures spread. (*Wall Street Journal,* 1/13/15)

Another approach for content providers when the going gets tougher will be to develop and exploit popular names and brands. For instance, Amazon Studios, which was started in 2010 to produce television shows, movies and special productions for Amazon Prime Video, recently signed a deal with Woody Allen to write and direct a full-season television series, which will premier in 2016. An increased dependence on already-known entities (and new entities that have reached popularity through other channels) could become an industry model in the months and years ahead. (*Associated Press*, 1/13/15)

Overall, industry shakeouts, company consolidations, market-share battles, pricing pressures and also some unique opportunities will be surfacing simultaneously in the near-to-medium term, as media companies narrow their focus to capturing consumer time and as consumers expand their behavior to assimilate, use or discard the ever-expanding offerings being placed before them. The Battle for Consumer Time is underway.

Some of our previous looks at this topic:

IF 3001 The End of Video Distribution as We Know It 1/28/09
eF 401 From Ocarina to iFart: Mobile-tainment Makes Some Noise 1/30/09
IF 3019 Adapt, Adopt and Add: The Scramble to Offer Everything, Every Way – for Everyone, Everywhere in Consumer Communications 9/22/09
eF 509 Seeking a New Model in the Video Gaming Industry 5/17/10
IF 3111 "We Reach for Our Devices" Youth and Society's Ongoing and Unofficial Digital-Communications Experiment 6/8/10
eF 513 Chipping Away at the Cable-TV Model 7/30/10
IF 3209 From Fascination to Function: Moving Toward Actual Value in the Digital World 4/13/11
eF 623 Checking In with Viewers, TV Fights for Your Focus 12/22/12
IF 3309 Is The Medium Still The Massage? Video Games and Social Media-Reflections Of Society's Direction 5/2/12
IF 3422 The Music Business Finds Its Groove: Experimentation and a New Way of Operating Save an Industry at Risk 12/27/13
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