

The next big thing

BI INTELLIGENCE

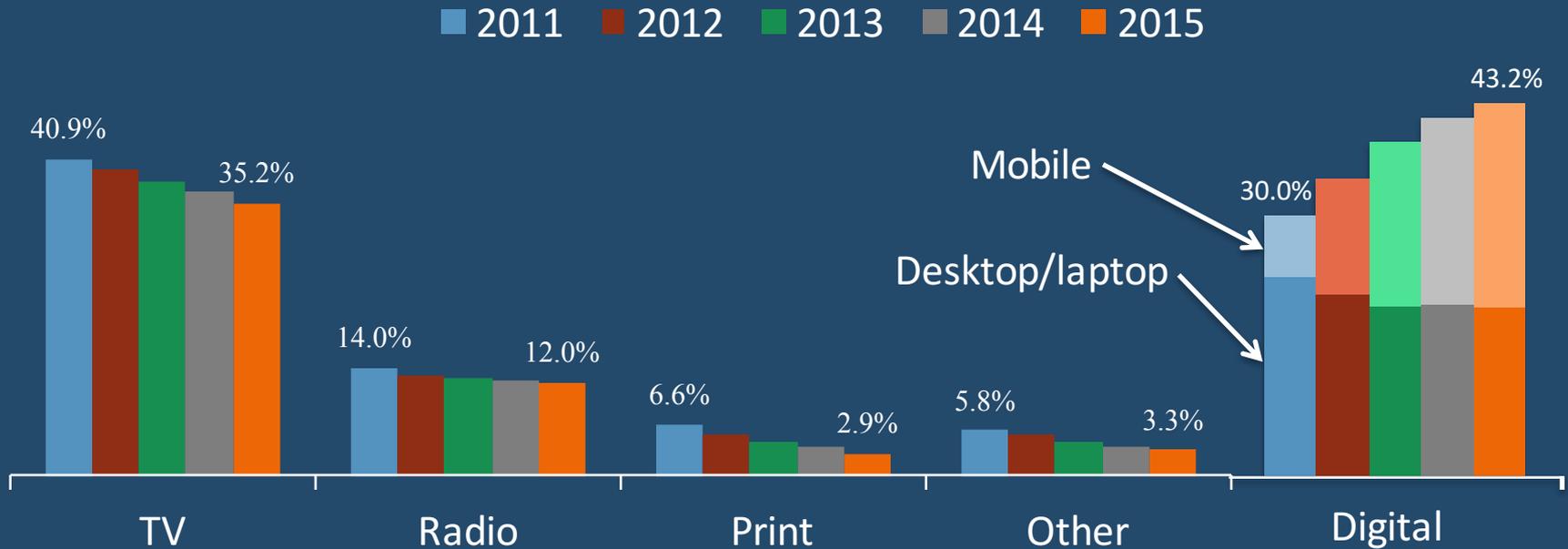
Providing in-depth insight, data, and analysis of everything digital.

DIGITAL IS INHERITING THE EARTH

BI INTELLIGENCE

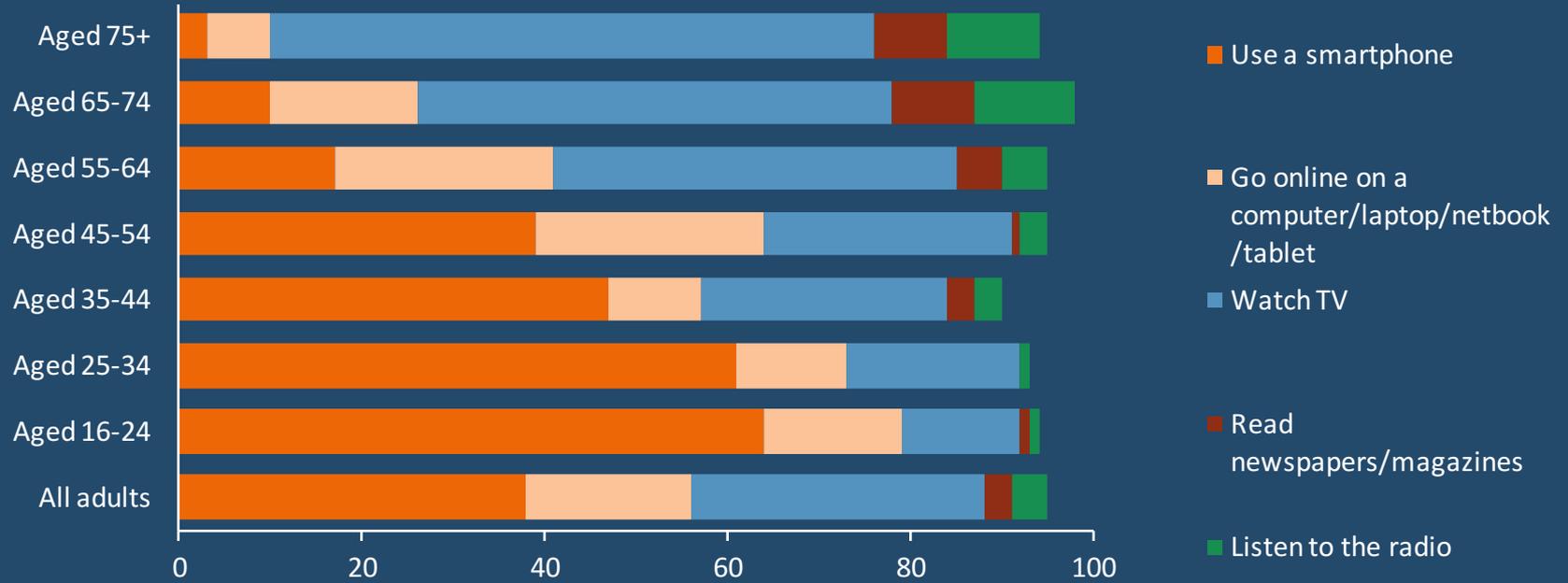
DIGITAL MEDIA CONSUMPTION IS GROWING, EVERYTHING ELSE IS SHRINKING

US Consumer Media Consumption Share



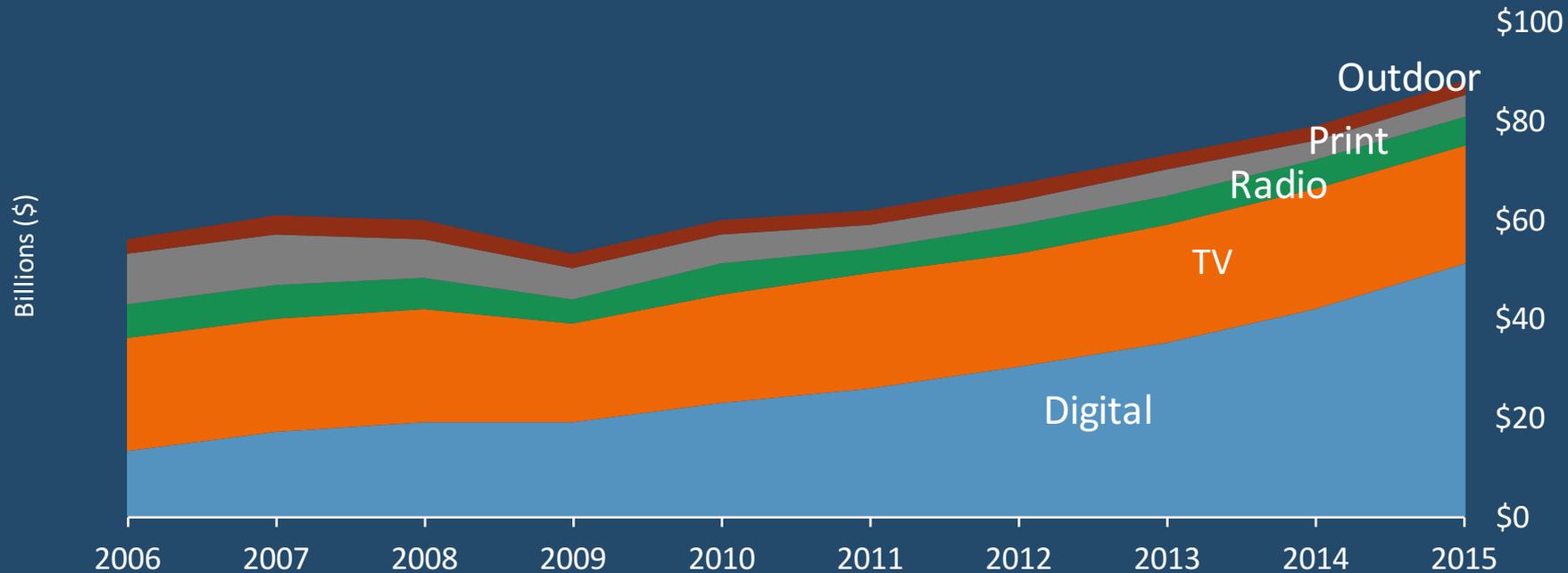
IT'S A GENERATIONAL SHIFT

Top 5 Media Mentions Among All Adults, 2016

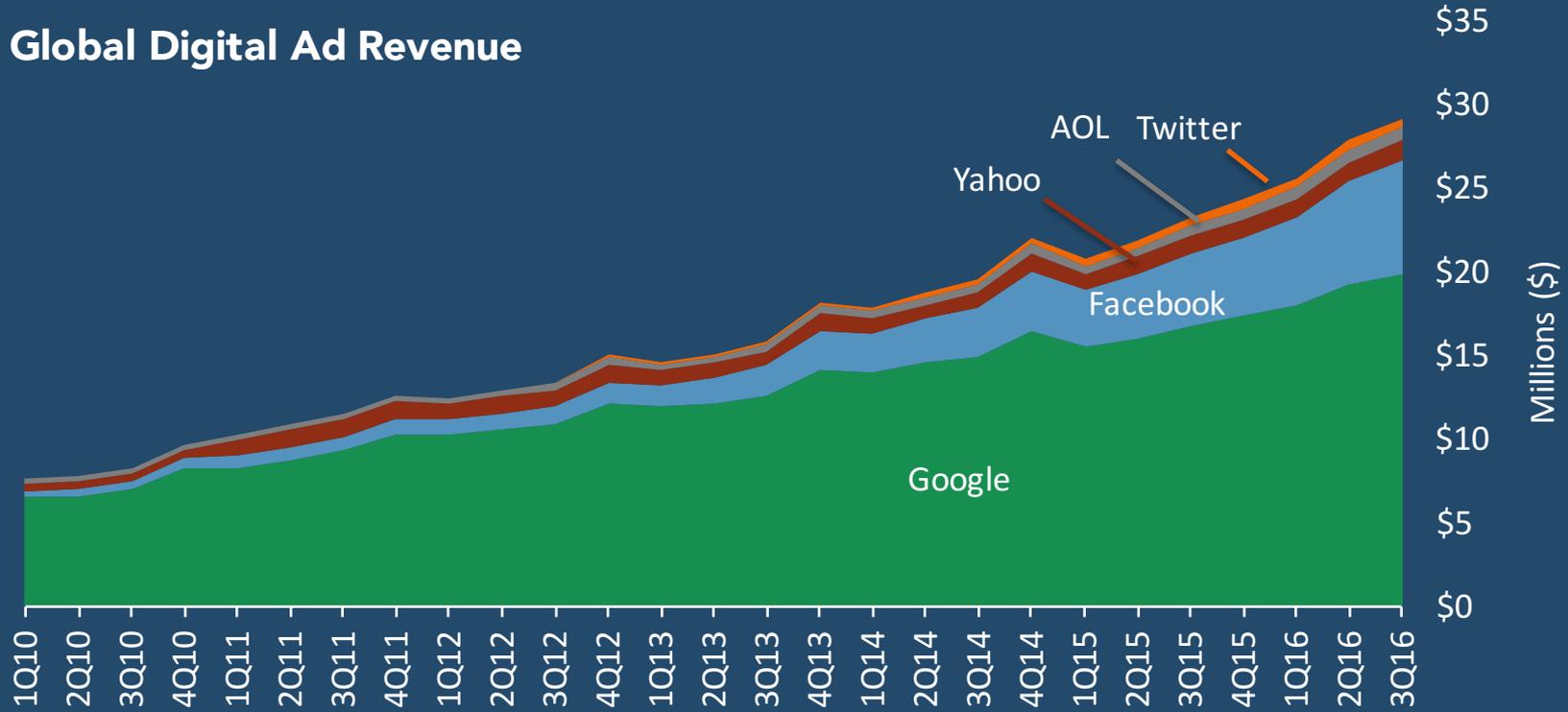


DIGITAL ADS GROWING, ALL ELSE FLAT

US Advertising Revenue

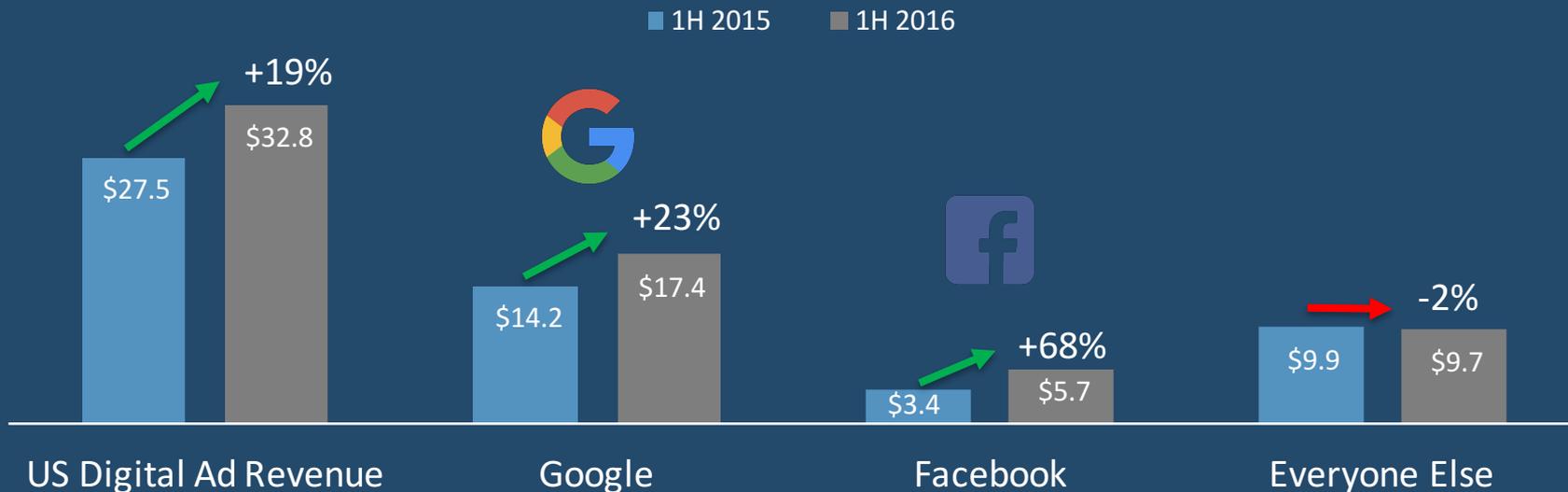


IT'S GOOGLE, FACEBOOK, AND "OTHER"



IN 1H 2016, GOOGLE AND FACEBOOK GREW, EVERYONE ELSE SHRANK

US Digital Ad Revenue, Billions (\$)

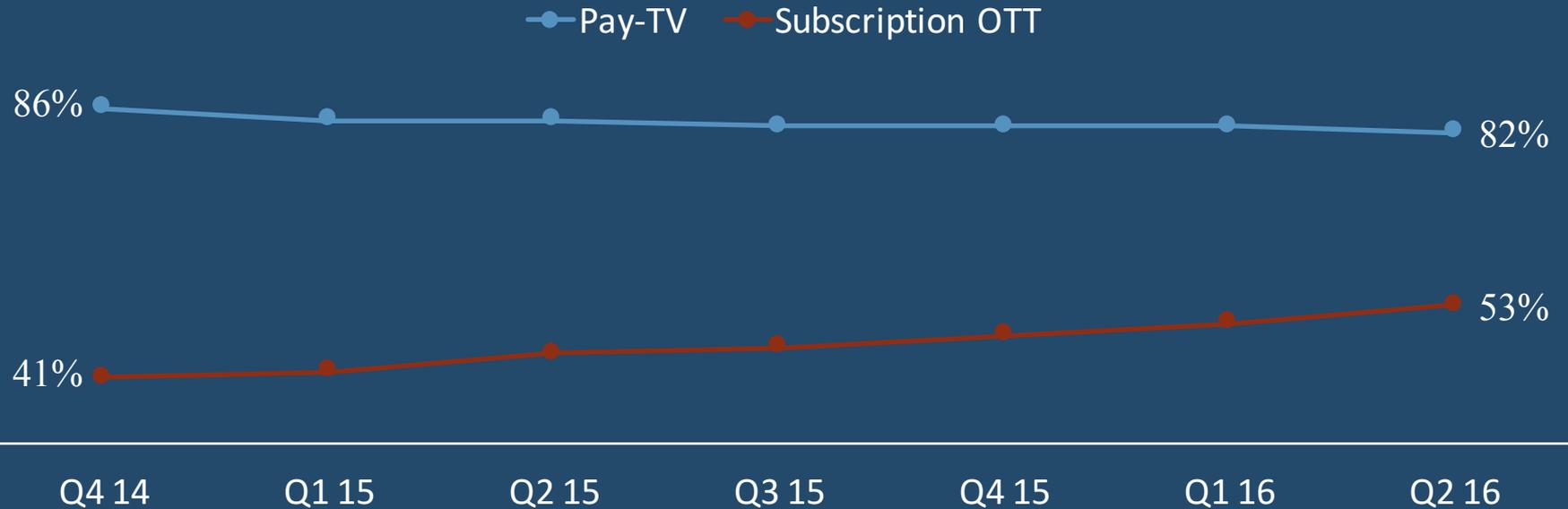


THE BELL TOLLS FOR LEGACY TV

For the last 20 years, digital has disrupted print. For the next 20, it will disrupt TV.

TRADITIONAL TV HAS PASSED ITS PEAK

Households With Pay TV Vs. Subscription OTT, % Of US Homes

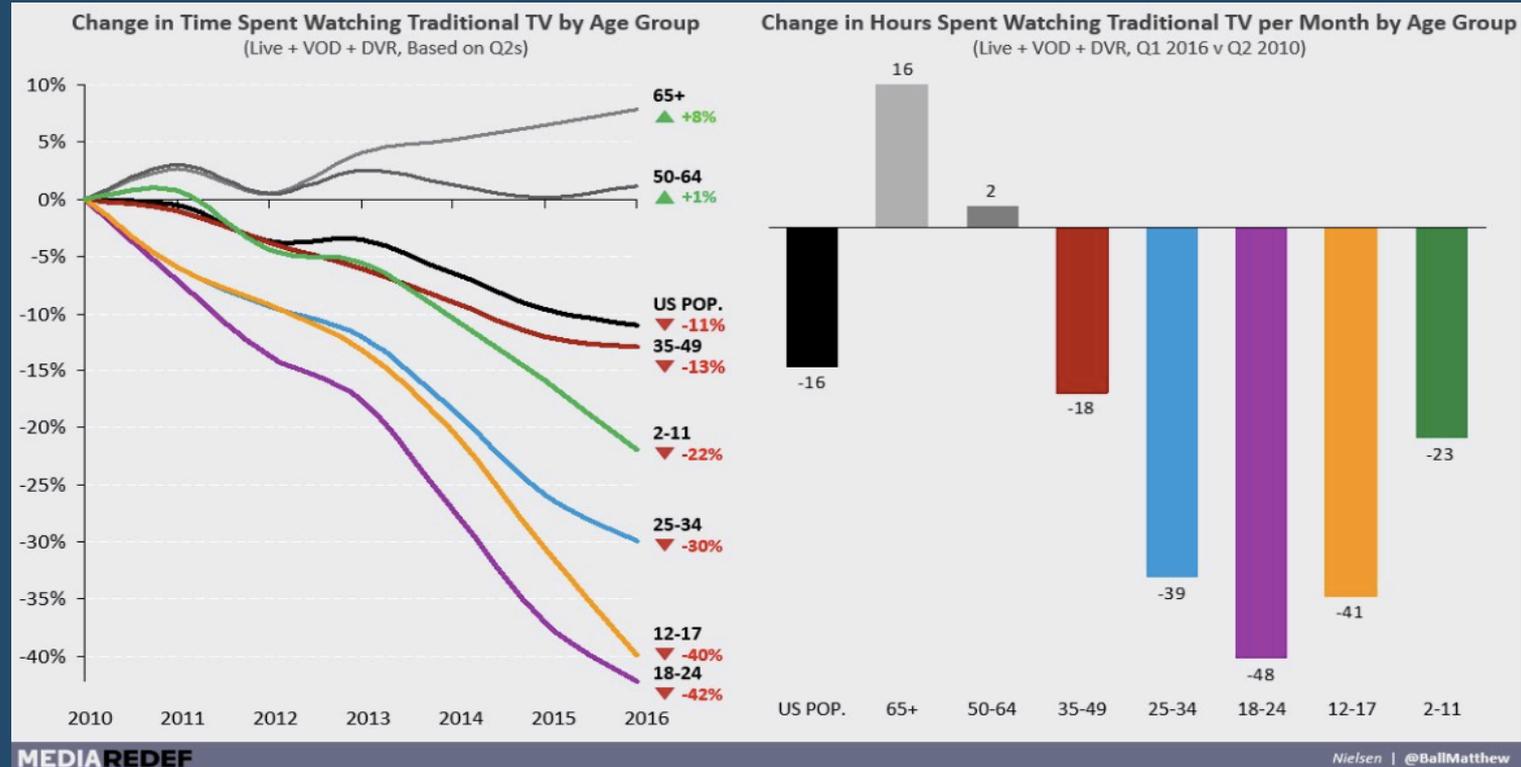


TRADITIONAL TV VIEWERSHIP IS FALLING

Average Time Spent Per Day Watching Traditional TV, HH:MM



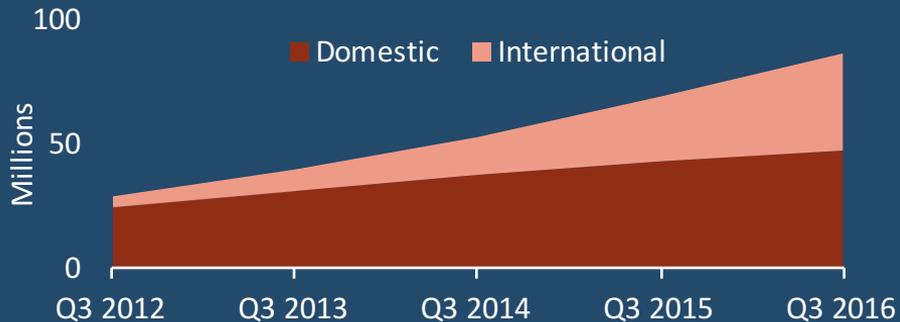
YOUNGER TV VIEWERSHIP IS COLLAPSING



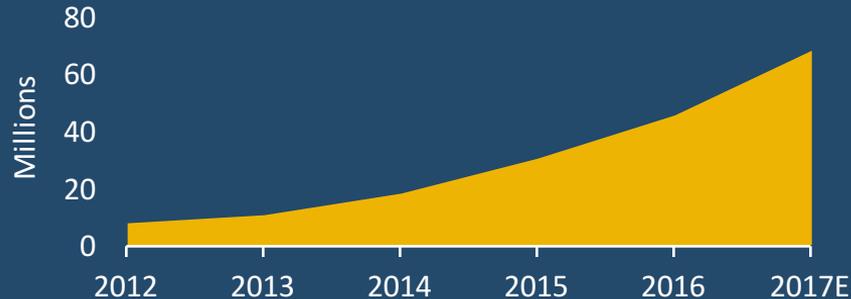
Meanwhile...

MODERN TV NETWORKS ARE EXPLODING

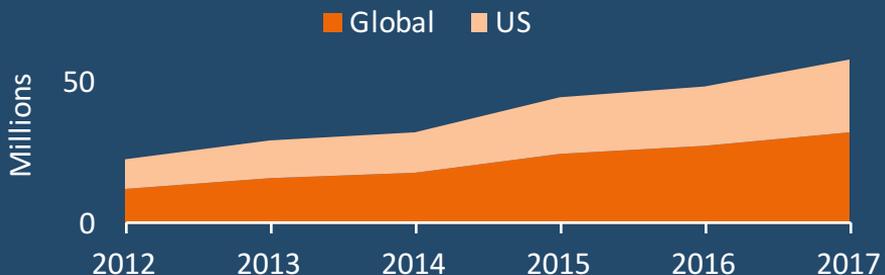
Netflix Subscribers



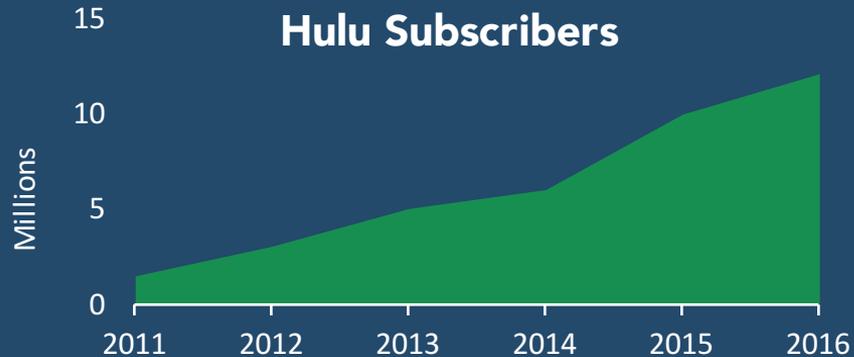
Amazon Prime Subscribers



Apple TV Installed Base

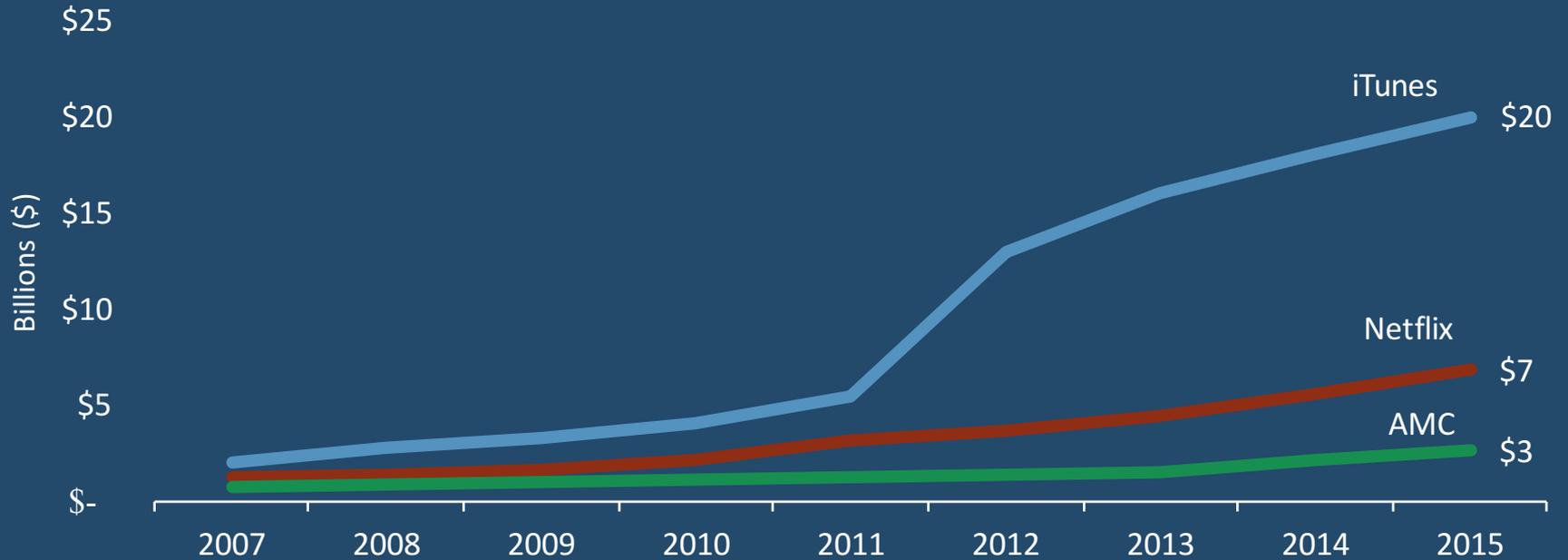


Hulu Subscribers



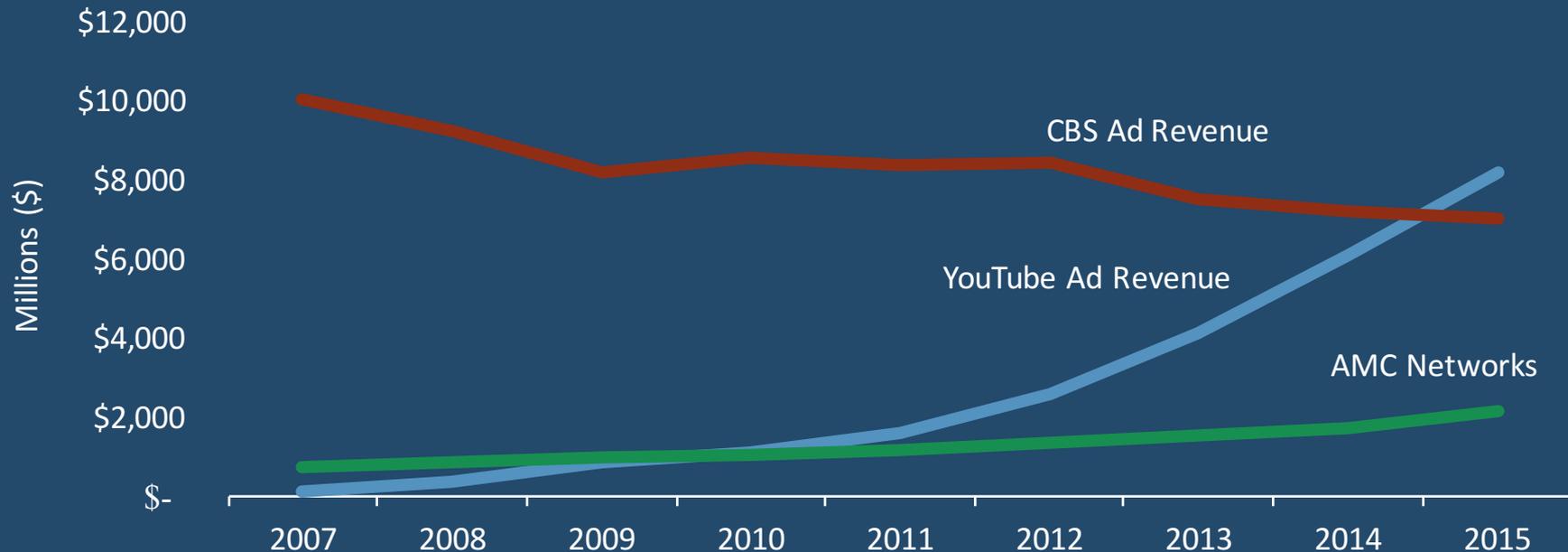
ITUNES, NETFLIX DWARF CABLE NETWORKS

Cable Network Vs. Digital Content Revenue



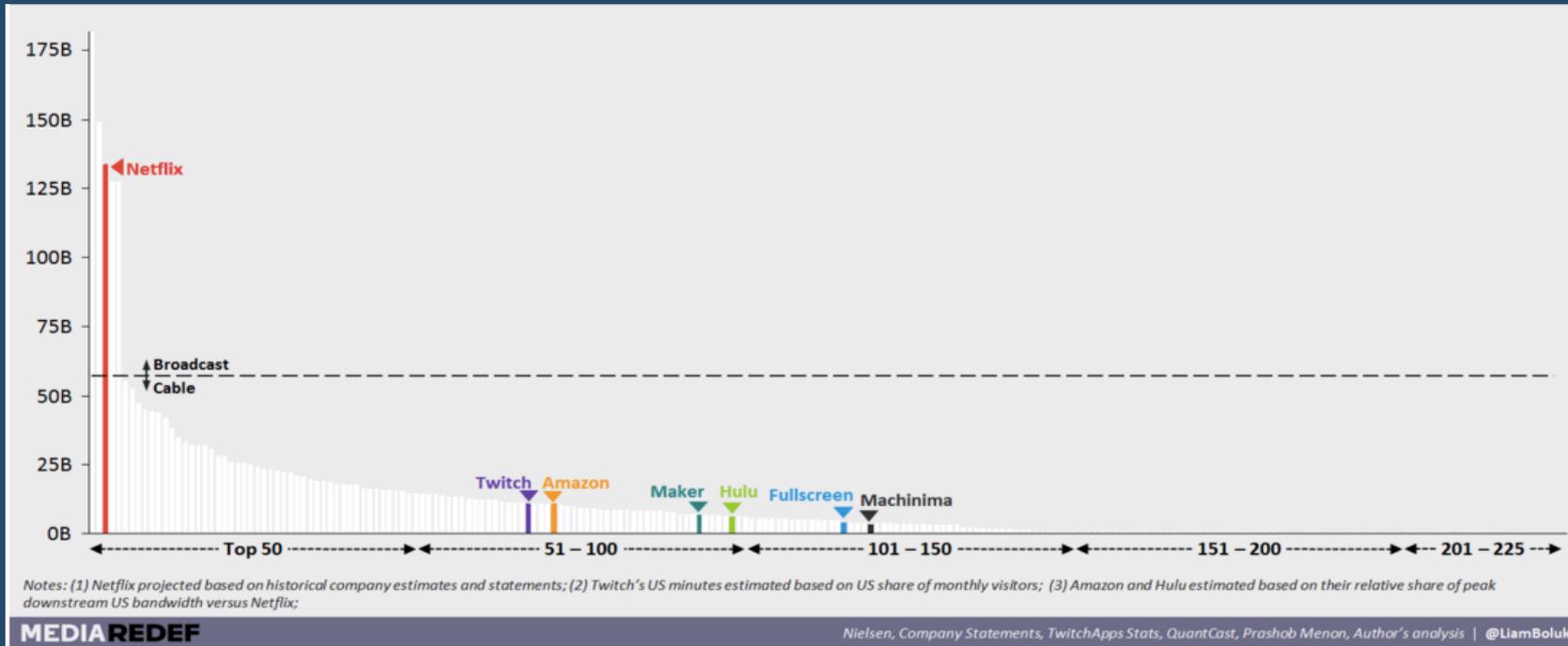
YOUTUBE NOW BIGGER THAN CBS

Modern Digital Ad Revenue Vs. Traditional TV Revenue



NETFLIX SAW MORE HOURS PER MONTH THAN ANY OTHER TV NETWORK

Total Hours Of Viewing, Per Month, Per Network



MODERN TV NETWORKS ARE JUST BETTER

We can watch what we want to,
when we want to —
anywhere, on any screen.

So what's going to happen?

First, TV won't "die."

Old media don't die. They get niche-ified.
(See radio and print.)

There are three parts of “TV” — and two are thriving.

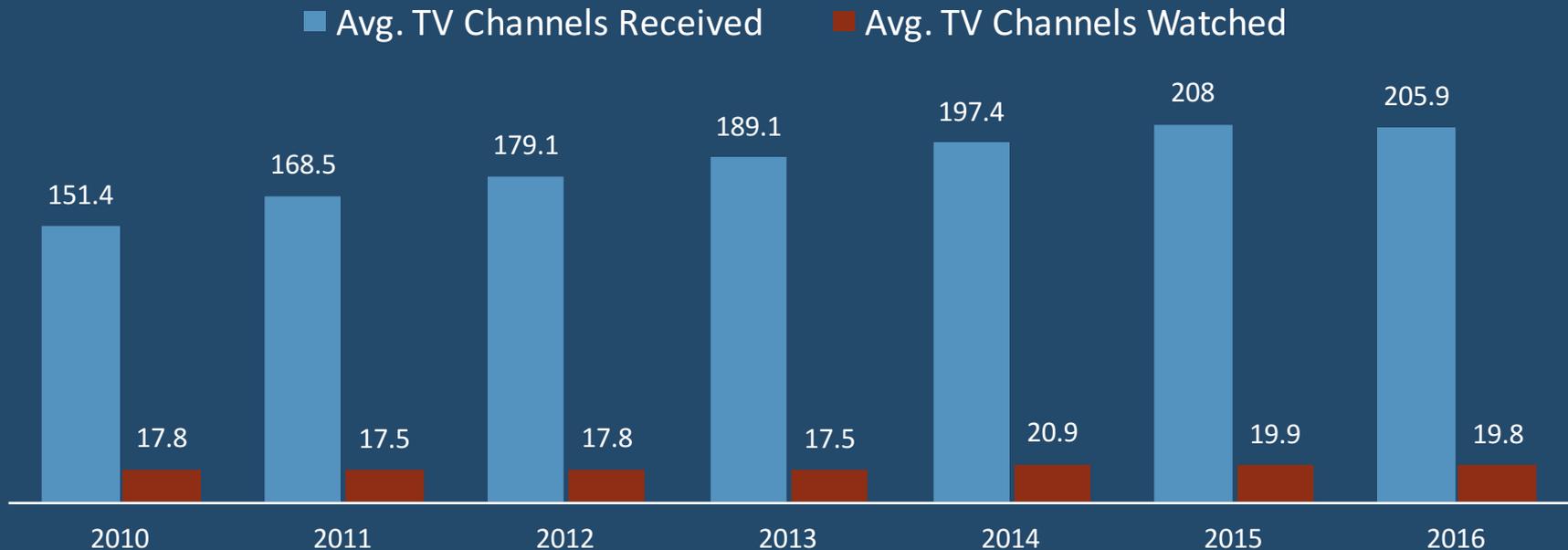
1. Modern digital TV networks
will continue to thrive.

2. Access providers will
continue to thrive.

3. Traditional TV networks will go through
~decades of consolidation and pain.

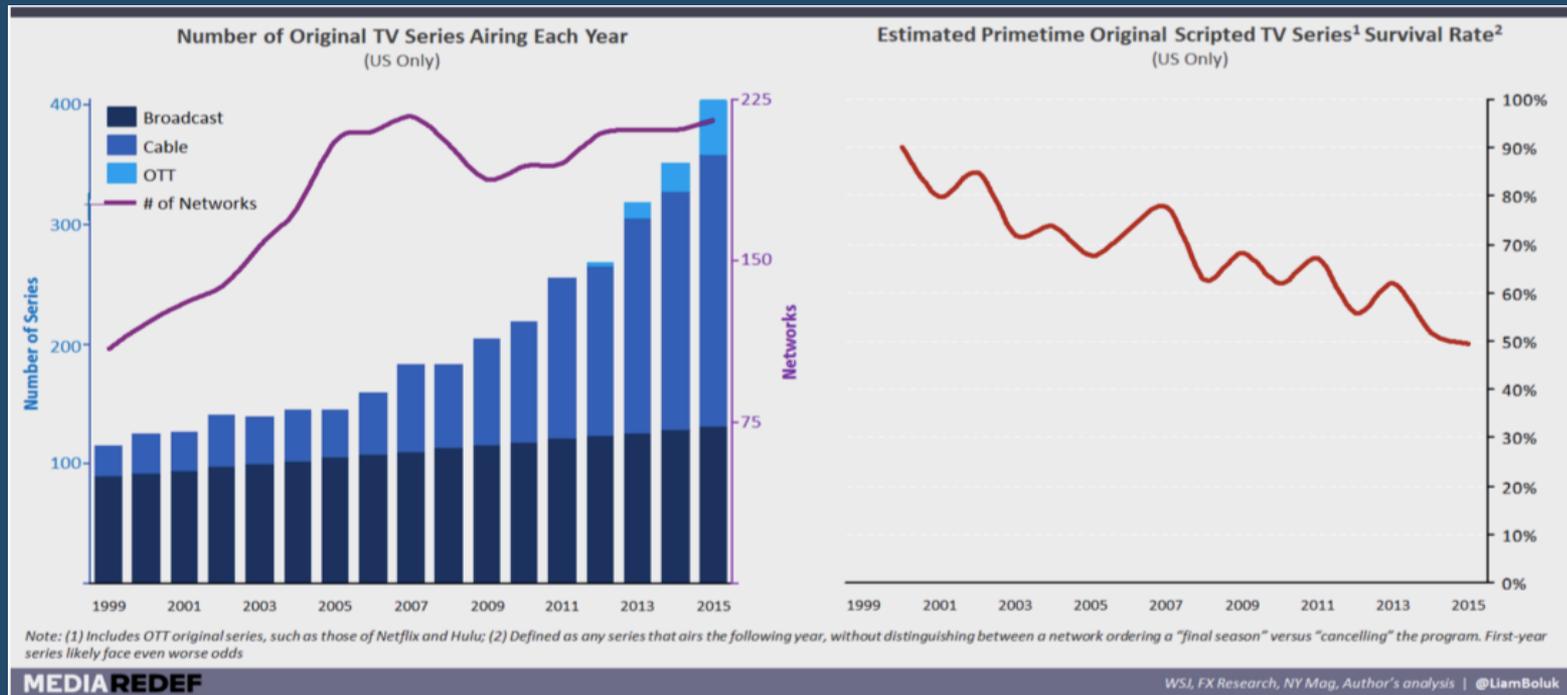
THERE ARE TOO MANY LEGACY NETWORKS

Channels Receivable And Watched, Per US TV Household



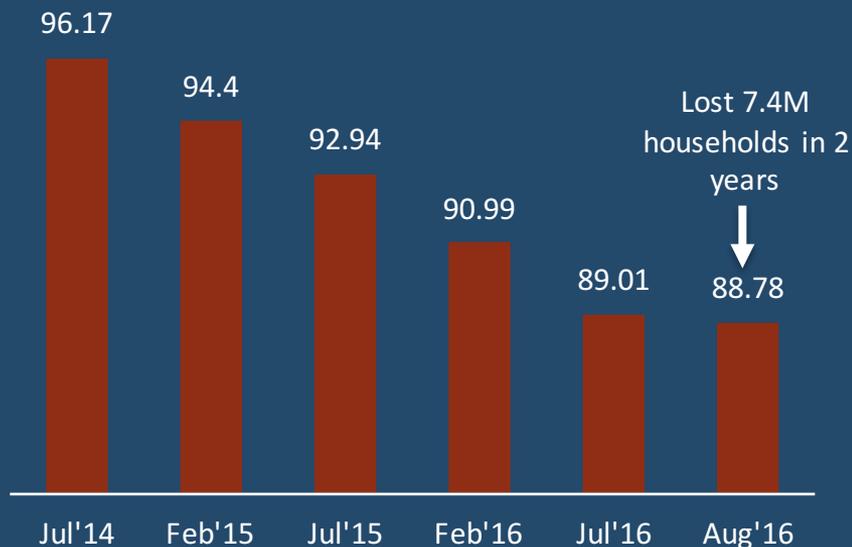
THERE AREN'T ENOUGH (GREAT) SHOWS

Average Original TV Series Each Year Vs. Survival Rate



EVEN TRADITIONAL STRONGHOLDS LIKE SPORTS ARE STARTING TO SEE DECLINES

Households With ESPN, Millions



NFL Football Ratings

Through first 4 weeks, 2015 vs. 2016

NBC Sunday Night Football: **-13%**

Fox Sunday: **-3%**

CBS Sunday: **-3%**

CBS Thursday Night: **-15%**

ESPN Monday Night: **-17%**

FORTUNATELY, TV IS AWASH IN MONEY

US Revenue, Billions (\$)



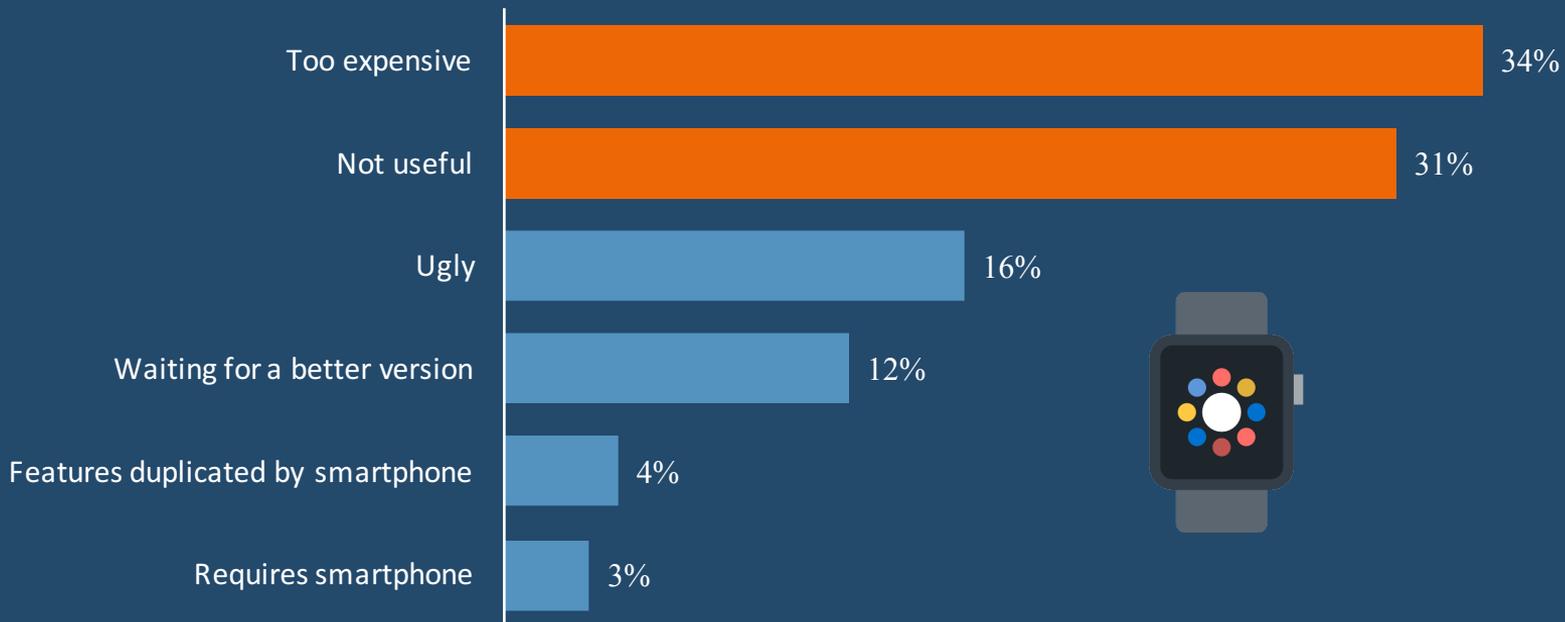
So TV networks will suffer in style.

THE NEXT BIG THING

BI INTELLIGENCE

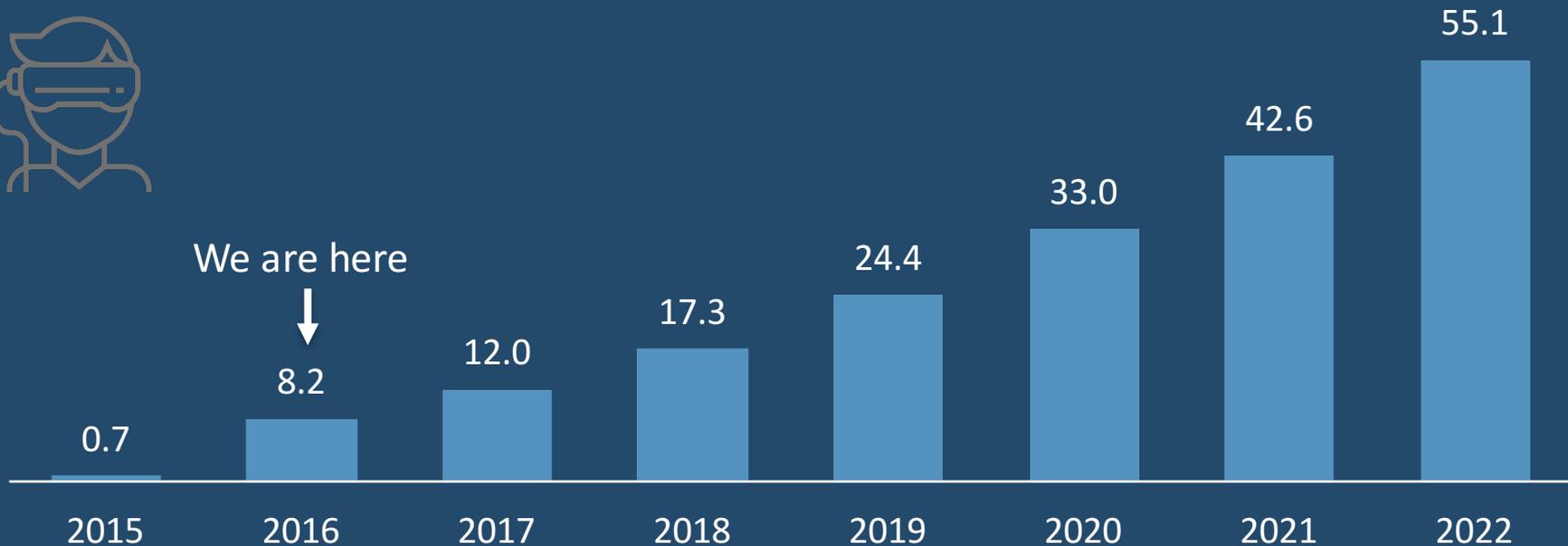
NOT SMARTWATCHES OR GLASSES — THESE AREN'T MEDIA CONSUMPTION DEVICES

Why Apple Watch Owners Wouldn't Buy Another Apple Watch



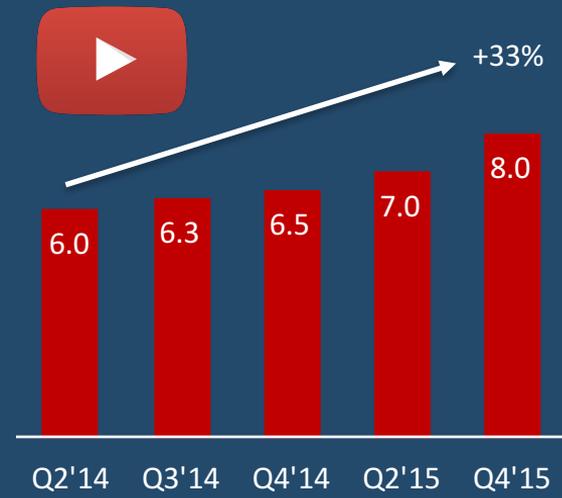
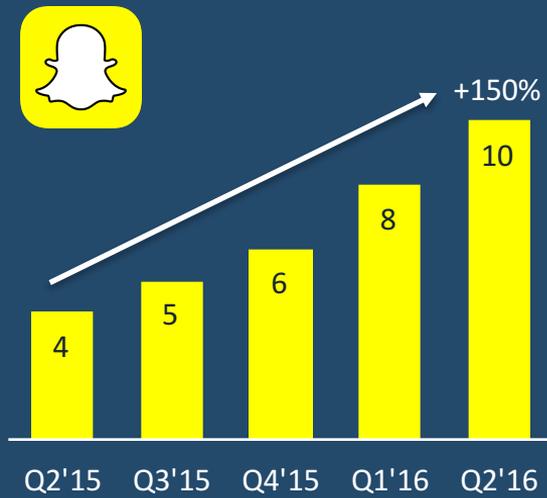
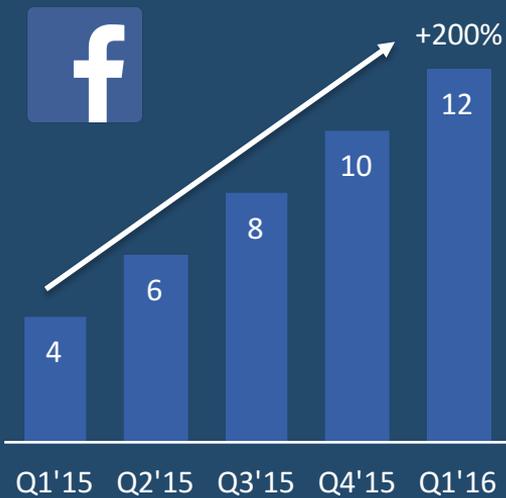
VR/AR HAS POTENTIAL, BUT IT'S STILL TOO EARLY...

Global VR Headset Shipments Forecast, Millions



THE NEXT BIG THING: SOCIAL VIDEO

Daily Video Views, By Platform, Billions

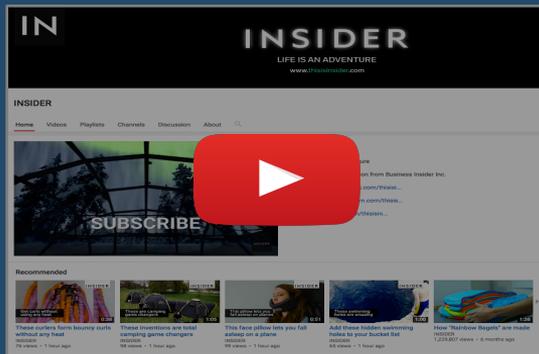
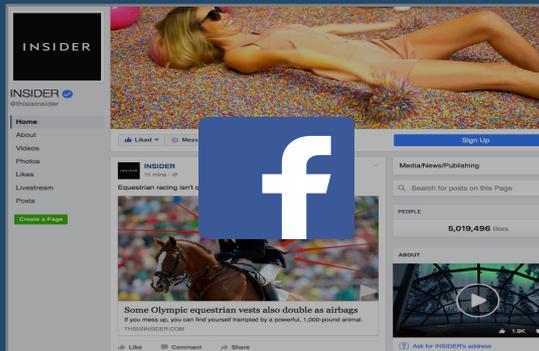


THIS IS A NEW KIND OF STORY

- “Thumb stopper”
- Sound optional
- Intimate and conversational
- (Often) square or vertical
- Shareable

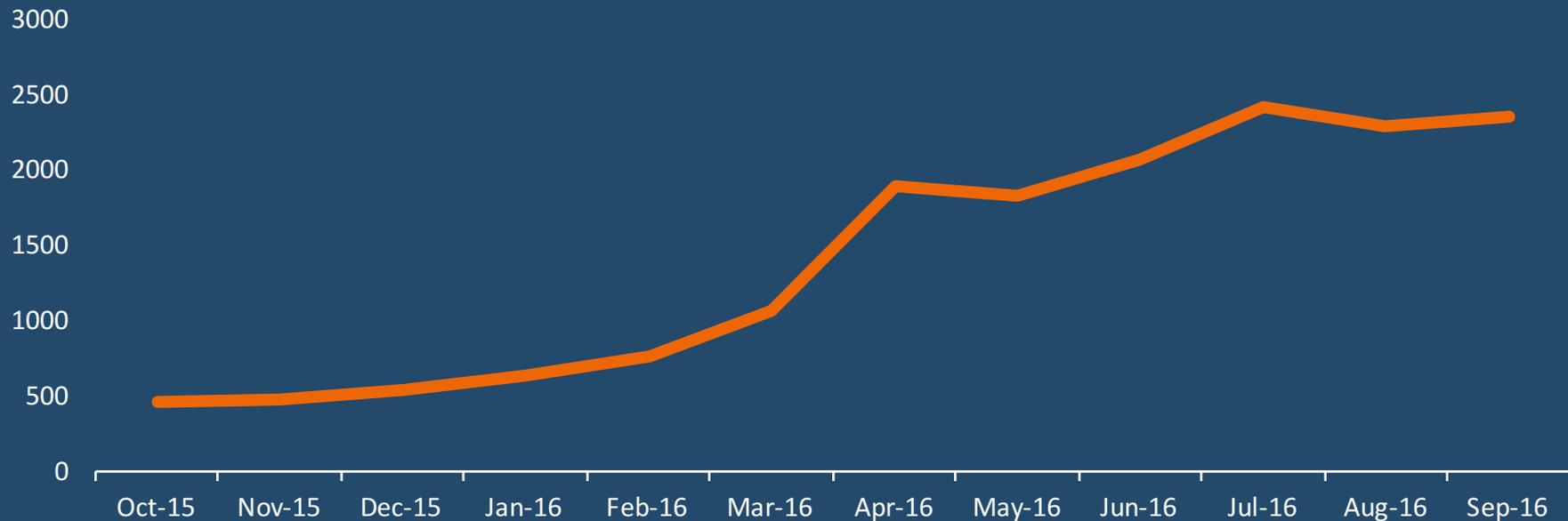


SOCIAL VIDEOS TRAVEL ACROSS PLATFORMS



THE OPPORTUNITY IS MASSIVE

Business Insider Monthly Video Streams, Millions



Social videos can be evocative,
entertaining, and effective.

INSIDER





Social videos can change behavior
and compel action.

THE RAINBOW BAGEL

“We got slammed like you couldn’t believe. I haven’t slept in weeks. It’s been crazy since Christmas, but Business Insider really put us over the top.”

-Francine LaBarbara, Marketing Coordinator, The Bagel Shop



 **The Bagel Store** @thebagelstore · Feb 3
We have suspended cream cheese shipping for the time being due to our high demand from our recent viral videos.

🔁 5 📄 17 ⋮

 butlikesrly FOLLOW

15 likes 4h

butlikesrly Williamsburg 2016: A viral video of their rainbow bagel has forced The Bagel Store to staff up for Crowd Control

solutioneering Brooklyn.

ashleyadelemartin I'd rather take an hour train ride to Weston, CT for a rainbow bagel than ever wait in that long ass line. #iame steamclam Damn

butlikesrly @ashleyadelemartin id rather take a train to Newark Airport than wait in that long a\$\$ line.

zar_inah deb.

taragordo @thisisinsider @thisisinsiderfood @tonymanfred woooooo!!! 🍩

hijean14 Wow

turnbyrd @rebcaes ha, I knew it has to be Williamsburg

Log in to like or comment. ⋮

TUBING IN THE HAWAIIAN WILDERNESS

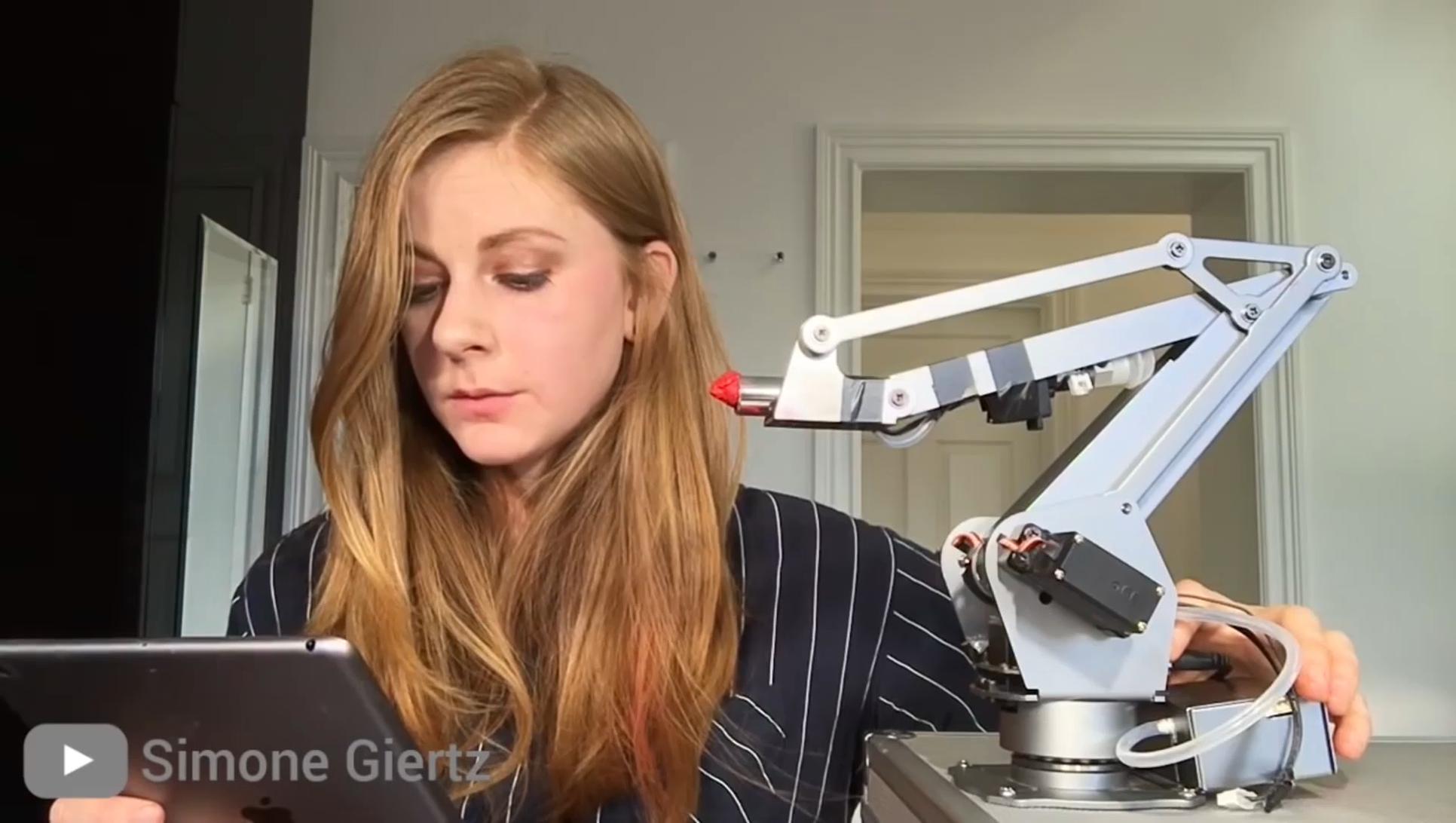


- 30+ million views
- “I don’t know how it happened but WOW”
- Phone’s ringing off the hook and reservations booked

THE SPIDER CATCHER

- 110+ million views
- Sales skyrocketed 500% on Amazon





Simone Giertz