

Radio's Role in the Emerging Mobile TV Marketplace

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New delivery platforms for radio

- Digital Radio
 - DAB
 - IBOC (HD Radio)
- The Internet
 - Station website
 - Streaming media
 - Downloads
 - Podcasts
- “Mobile TV” opportunities
 - Operating on digital radio channels?
 - Radio services as part of Mobile TV package

Mobile TV in US

- Hybrid devices
 - 3G phone + digital TV receiver
 - Two emerging, competing systems
- Qualcomm *MediaFLO*
 - Using UHF-TV channel 55
 - Proprietary transmission format
 - MPEG-4 codecs
 - First deployment by Verizon Wireless
- Crown Castle *Modeo*
 - Using 5 MHz of repurposed L-band spectrum
 - DVB-H transmission
 - Microsoft WM9S codecs
 - Deployment partners TBD
- Prospects uncertain for both

Guidance

- Leverage exclusive assets
 - Local content remains important
 - Network affiliation maintains some appeal
- Explore and exploit new delivery options
 - Own the RF, rent the wire or wireless service
 - Push vs. pull: Station sites, portals, search engines
- Manage the new business model
 - It's a multiplatform world
 - For on-line services, marginal cost per listener/viewer is >0
 - Make this cost worthwhile by enhancing service
 - On demand, personalized, targeted
 - Explore new advertising models
- Broadcast + on-line + wireless is powerful synergy

