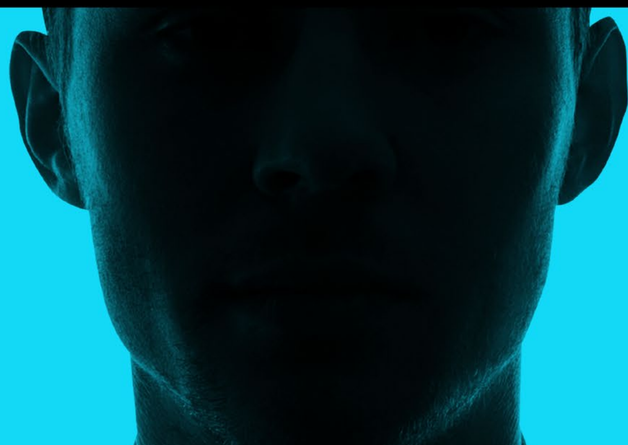
Presented by NAB SHOW
Where Content Comes to Life

RULERS OF ENGAGEMENT

The war among the biggest tech and media companies to capture consumer attention



VIP+ VARIETY INTELLIGENCE PLATFORM

A small group of big companies dominate a dizzying array of products and services aimed at your eyes and ears.

In the grand scheme of how a global pandemic will reshape the future, there are more profound issues to consider than the impact COVID-19 is having on the media and technology businesses. But even as so much is disrupting these industries, some things don't change: Their competitive framework remains intact.

From 30-minute TV shows to 3-milisecond search-engine returns, a mega-war is being waged for mindshare across billions of devices worldwide. While the media business is at the epicenter of this frenzy, it's the technology giants who have escalated the conflict. They too create content to support their ultimate goal: keeping consumers inside their ecosystems of products and services for as long as possible (and away from their rivals).

That means conglomerates from Apple to AT&T to Amazon to Disney are competing with each other across a broad swath of overlapping business interests, from TV stations to app stores to video game consoles to smart watches.

These companies are the "Rulers of Engagement." Variety Intelligence Platform and the National Association of Broadcasters present a topline examination of the trends and rivalries that distinguish the many different markets in the attention economy. In the slides that follow, we examine 25 such competitive sets.

Take a front-row seat to the biggest business battleground on the planet.

Andrew Wallenstein
President and Chief Media Analyst, VIP

CATEGORY	COMPANY
SVOD	Netflix
Search	Google
Wearables	Apple
Box Office	Disney
Streaming Audio	Spotify
Smart Speakers	Amazon
Social Media	Facebook
Messaging	Facebook
App Stores	Apple
Operating Systems	Microsoft
Cloud Services	Amazon
Smartphones	Samsung
PCs/Tablets	Apple
TV Networks	Disney
TV Stations	Nexstar
Pay TV	Comcast
SVOD Aggregators	Amazon
Virtual MVPDs	Disney
Connected TV	Roku
Game Publishers	Tencent
Livestreaming	Amazon
Game Consoles	Sony
Cloud Gaming	Sony
VR Headsets	Facebook
Smart Glasses	Microsoft

SVOD

RULER: **NETFLIX**

A surge of new subscription video on demand services isn't likely anytime soon to topple **Netflix**, the company far and away at the forefront of this market.

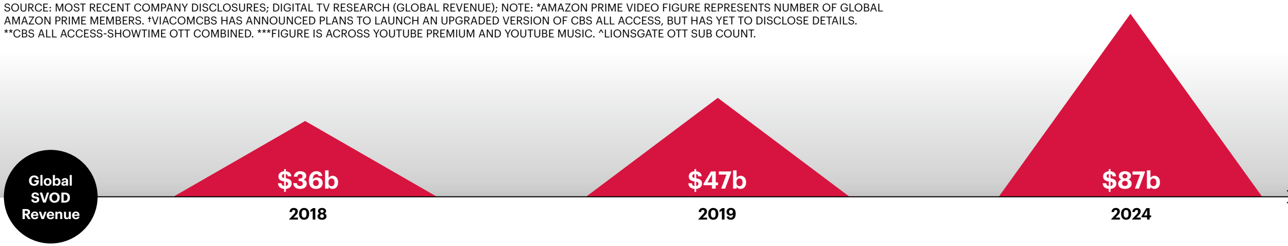
OWNER	SERVICE
Alphabet	YouTube Premium
Amazon	Amazon Prime Video
Apple	Apple TV Plus
AT&T	HBO Now, HBO Max
Comcast	Peacock
Disney	ESPN Plus, Disney Plus, Hulu
Lionsgate	Starz
Netflix	Netflix
ViacomCBS	CBS All Access†, Showtime

Service	Launch	Global Subs	Flagship Content
Netflix	January 2007	183m	"Stranger Things"
Hulu	March 2008	32.1m	"Handmaid's Tale"
Prime Video	February 2011	150m*	"The Marvelous Mrs. Maisel"
CBS All Access	October 2014	11m**	"Twilight Zone"
HBO Now	April 2015	8m	"Game of Thrones"
Showtime	July 2015	11m**	"Billions"
YouTube Premium	October 2015	20m***	"Cobra Kai"
Starz	April 2016	8.6m^	"Power"
ESPN+	April 2018	7.9m	"Detail"
Apple tv+	Nov. 1, 2019	N/A	"The Morning Show"
Disney+	Nov. 12, 2019	54.5m	"The Mandalorian"
Peacock	April 15, 2020 (for Xfinity); July 15, 2020 (for public)	N/A	"Battlestar Galactica" reboot
HBO Max	May 27, 2020	N/A	"Tokyo Vice"

2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

FIRST WAVE — SECOND WAVE

SOURCE: MOST RECENT COMPANY DISCLOSURES; DIGITAL TV RESEARCH (GLOBAL REVENUE); NOTE: *AMAZON PRIME VIDEO FIGURE REPRESENTS NUMBER OF GLOBAL AMAZON PRIME MEMBERS. †VIACOMCBS HAS ANNOUNCED PLANS TO LAUNCH AN UPGRADED VERSION OF CBS ALL ACCESS, BUT HAS YET TO DISCLOSE DETAILS. **CBS ALL ACCESS-SHOWTIME OTT COMBINED. ***FIGURE IS ACROSS YOUTUBE PREMIUM AND YOUTUBE MUSIC. ^LIONSGATE OTT SUB COUNT.



SEARCH

RULER: **GOOGLE**

U.S. Search Engine Market Share for Q2 2019

	MARKET SHARE
Google	93.53%
Google Search	69.35%
Google Images	20.45%
YouTube	2.98%
Google Maps	0.75%
Amazon	1.99%
Yahoo (Verizon)	1.41%
Bing (Microsoft)	1.18%
Facebook	0.96%
DuckDuckGo	0.4%
Twitter	0.2%
Pinterest	0.2%

Estimated Net U.S. Ad Revenue Share for 2020

	AD SHARE
Google	71.1%
Amazon	14.3%
Microsoft	5.9%
Verizon	1.7%
Yelp	1.7%
IAC	0.7%
Other	4.6%

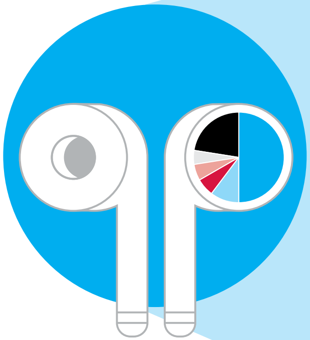
Google's long-lasting domination of the search engine market is unparalleled. They've simply owned it since the beginning, though Amazon has strengthened its hand over time.

SOURCE: JUMPSHOT, SPARKTORO(MARKET SHARE); EMARKETER (AD SHARE)

WEARABLES

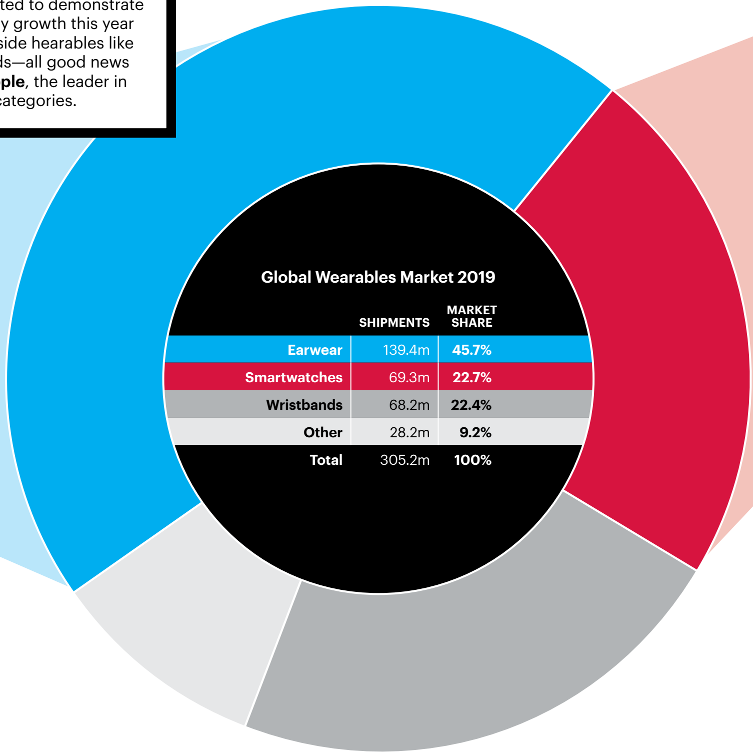
RULER: **APPLE**

Smartwatches are expected to demonstrate healthy growth this year alongside hearables like AirPods—all good news for **Apple**, the leader in both categories.



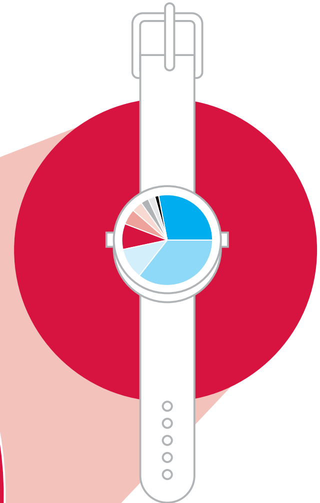
Global Earbud Market Share Sept. 2019

	NOTABLE PRODUCTS	MARKET SHARE
Apple	AirPods, Beats	50.2%
Samsung	Galaxy Buds	10.2%
Xiaomi	AirDots	6.5%
Bose	SoundSport	5.7%
GN Group	Jabra	5.1%
Other		22.3%



Global Wearables Market 2019

	SHIPMENTS	MARKET SHARE
Earwear	139.4m	45.7%
Smartwatches	69.3m	22.7%
Wristbands	68.2m	22.4%
Other	28.2m	9.2%
Total	305.2m	100%



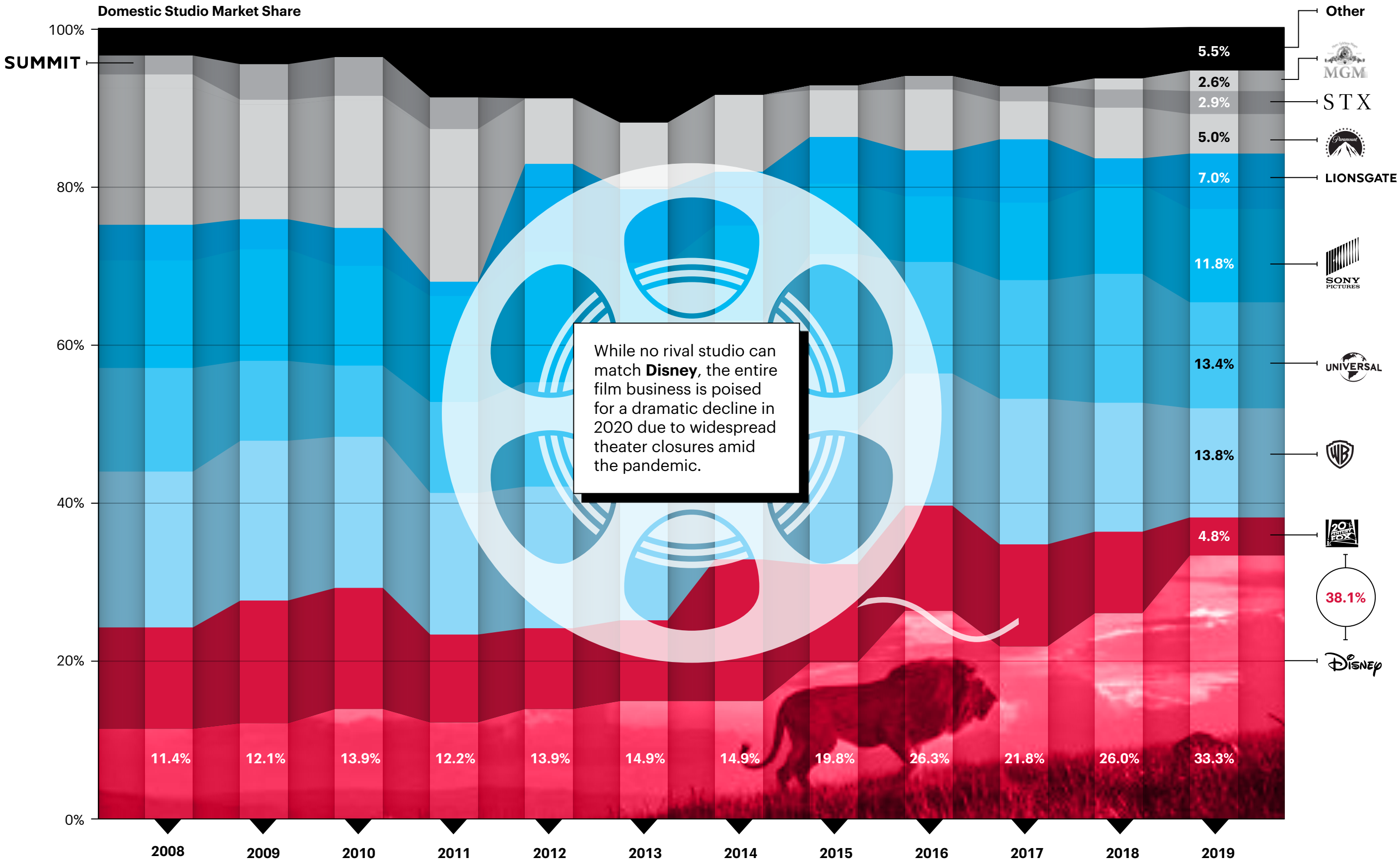
Global Smartwatch Market Share Q1 2019

	MARKET SHARE
Apple	35.8%
Samsung	11.1%
BBK (imoo)	9.2%
Fitbit	5.5%
Xiaomi (Amazfit)	3.7%
Huawei	2.8%
Fossil Group	2.5%
Garmin	1.5%
Others	27.9

SOURCE: IDC (WEARABLES 2019, EARBUDS SEPT. 2019); COUNTERPOINT RESEARCH (SMARTWATCHES Q1 2019)

BOX OFFICE

RULER: **DISNEY**

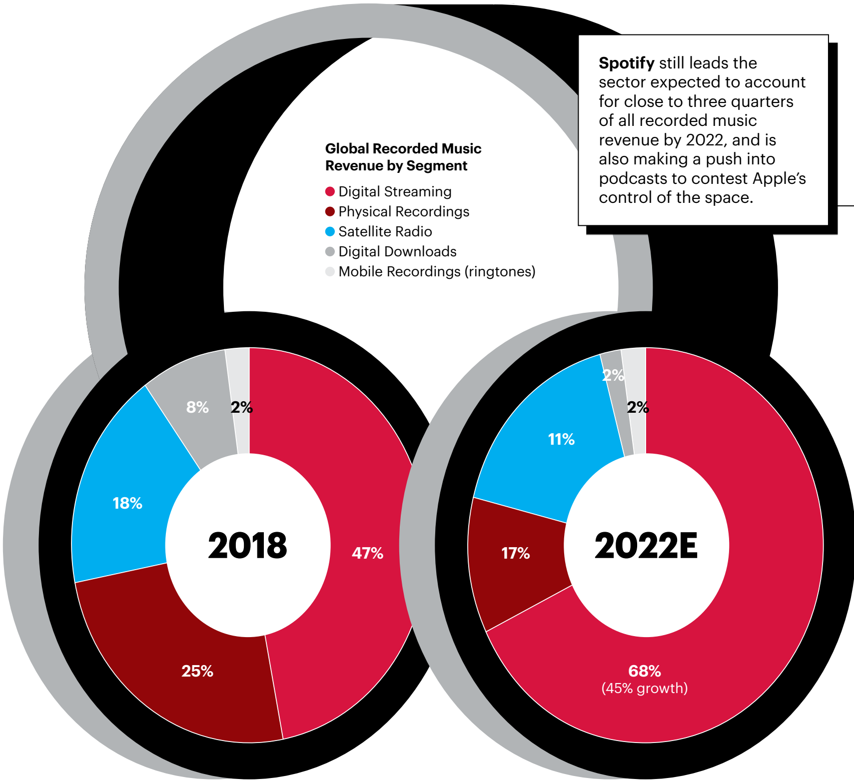


SOURCE: BOX OFFICE MOJO

STREAMING AUDIO

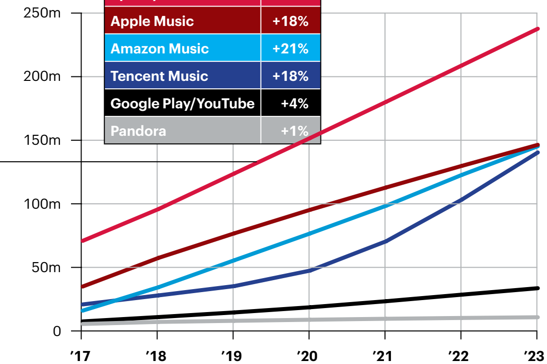
RULER: **SPOTIFY**

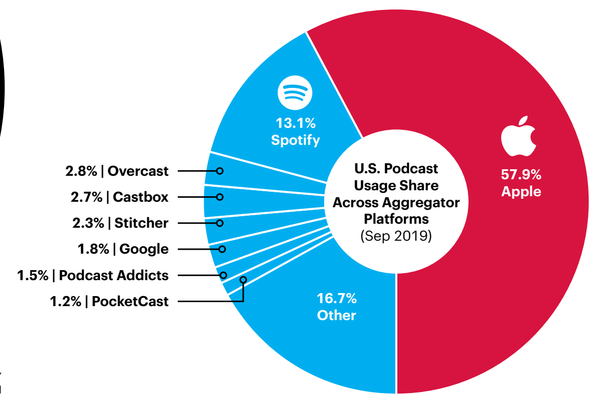
Spotify still leads the sector expected to account for close to three quarters of all recorded music revenue by 2022, and is also making a push into podcasts to contest Apple's control of the space.



Estimated Trajectory of Global Paid Music Streaming Subscribers by Service

SERVICE	AVG. YoY GROWTH
Spotify	+27%
Apple Music	+18%
Amazon Music	+21%
Tencent Music	+18%
Google Play/YouTube	+4%
Pandora	+1%

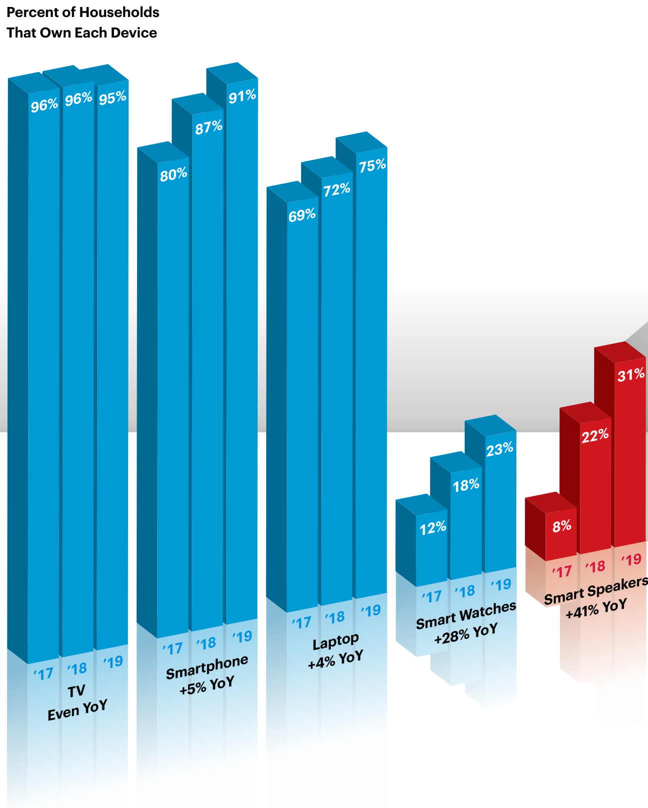


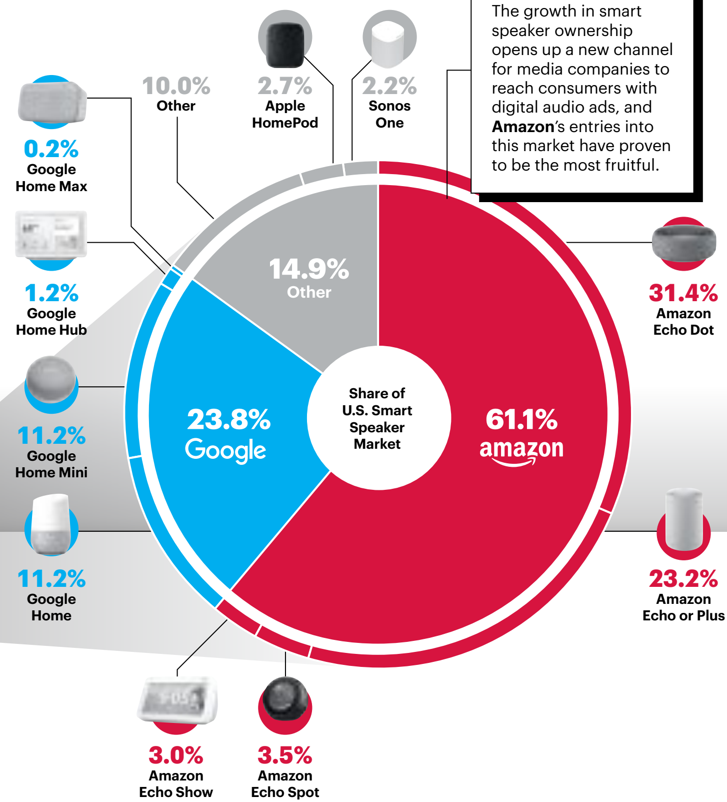


SOURCE: MORGAN STANLEY RESEARCH, RIAA, IFPI, RAB, PWC (RECORDED MUSIC REV BY SEGMENT); MORGAN STANLEY RESEARCH, RIAA, IFPI, WSJ, REUTERS (STREAMING SERVICE PAID SUB FORECAST); PODCASTS: LIBSYN

SMART SPEAKERS

RULER: **AMAZON**

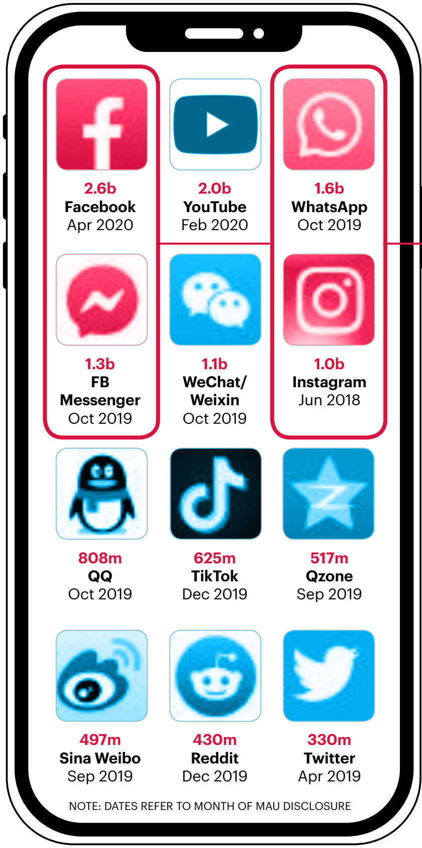




The growth in smart speaker ownership opens up a new channel for media companies to reach consumers with digital audio ads, and **Amazon**'s entries into this market have proven to be the most fruitful.

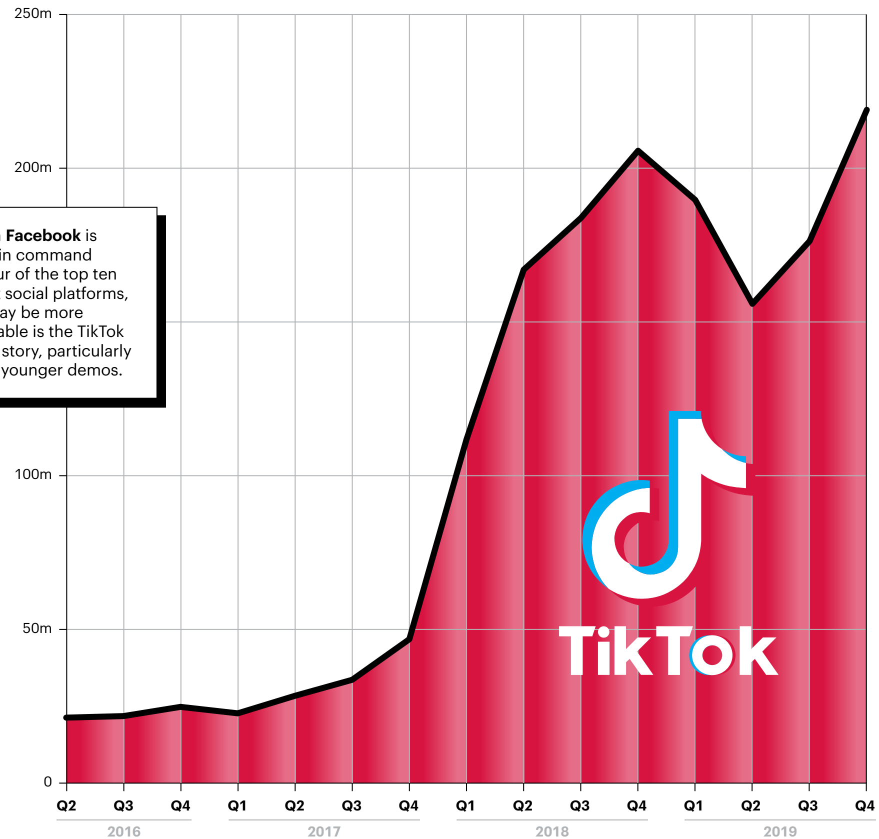
SOURCE: CONSUMER TECHNOLOGY ASSOCIATION (PENETRATION OF TECH DEVICES); VOICEBOT (SMART SPEAKER MARKET SHARE)

Most Popular Social Platforms (Global MAUs)



Though **Facebook** is clearly in command with four of the top ten biggest social platforms, what may be more remarkable is the TikTok growth story, particularly among younger demos.

First-Time Installs of TikTok by Quarter



SOURCE: COMPANY REPORTS, DATAREPORTAL (MAUS); SENSOR TOWER, 2020 (TIK TOK)

MESSAGING

RULER: **FACEBOOK**

Video Chat Usage Booms Due to COVID-19

zoom

Zoom

378%

Year-over-year daily meeting participants as of March 22

Google

Meet

60%+

Sustained daily active user growth as of March 31

Microsoft

Teams

38%

Week-over-week daily active users as of March 19

Skype

70%

Month-over-month daily active users as of March 30

FACEBOOK

Messenger

70%

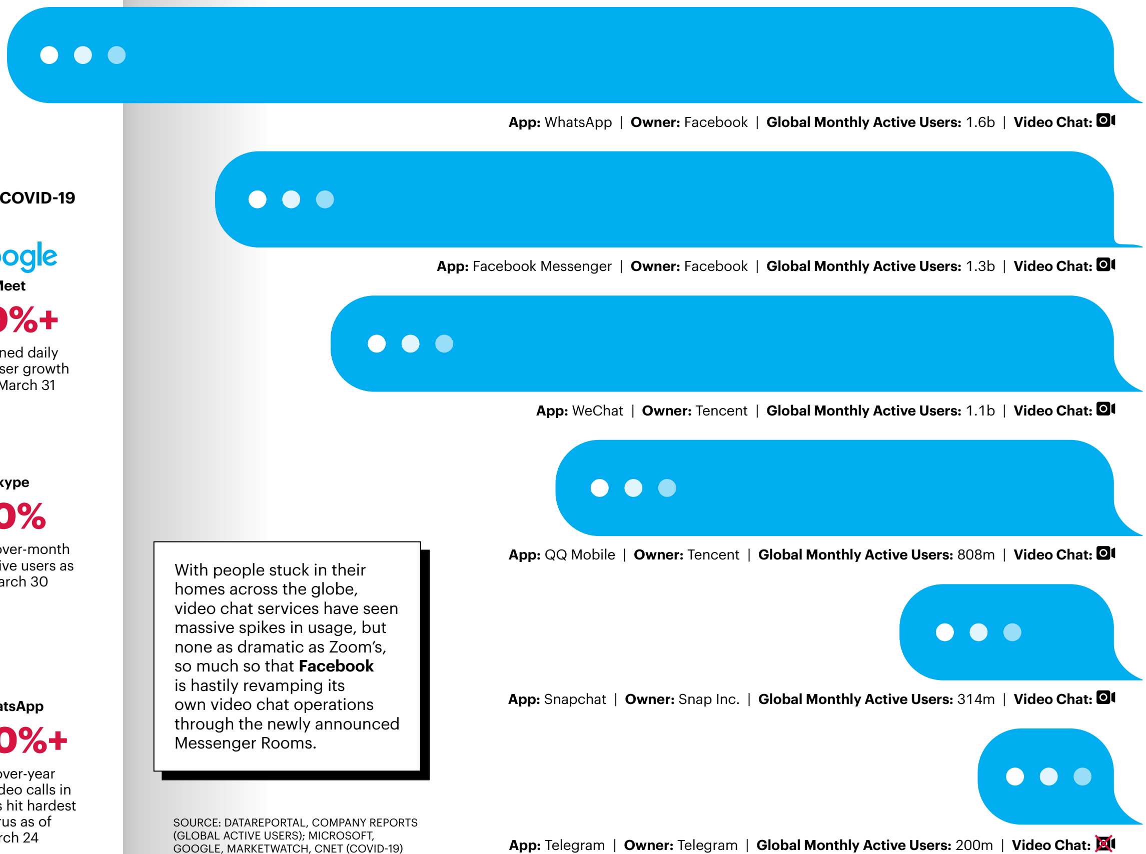
Week-over-week participant increase on group video calls as of March 24

WhatsApp

100%+

Year-over-year voice/video calls in countries hit hardest by virus as of March 24

Mobile Messaging Apps by Monthly Global Active Users, Oct 2019



With people stuck in their homes across the globe, video chat services have seen massive spikes in usage, but none as dramatic as Zoom's, so much so that **Facebook** is hastily revamping its own video chat operations through the newly announced Messenger Rooms.

SOURCE: DATAREPORTAL, COMPANY REPORTS (GLOBAL ACTIVE USERS); MICROSOFT, GOOGLE, MARKETWATCH, CNET (COVID-19)

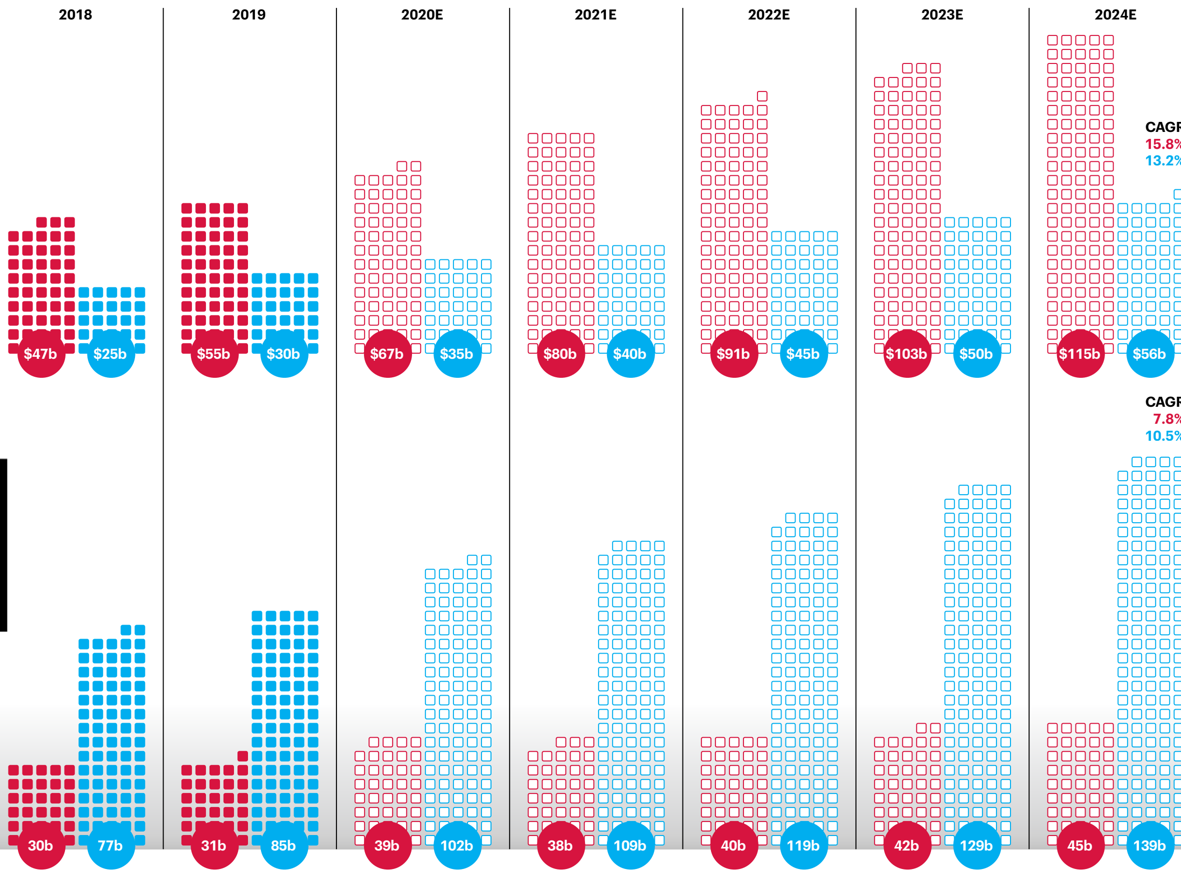
APP STORES

RULER: **APPLE**

Google

Global App Store Revenues & Forecast

☐ = estimate



Google's lead in Play Store downloads has done little to stop them from trailing **Apple**'s App Store revenue, which will only widen by 2024.

Global App Store Downloads & Forecast

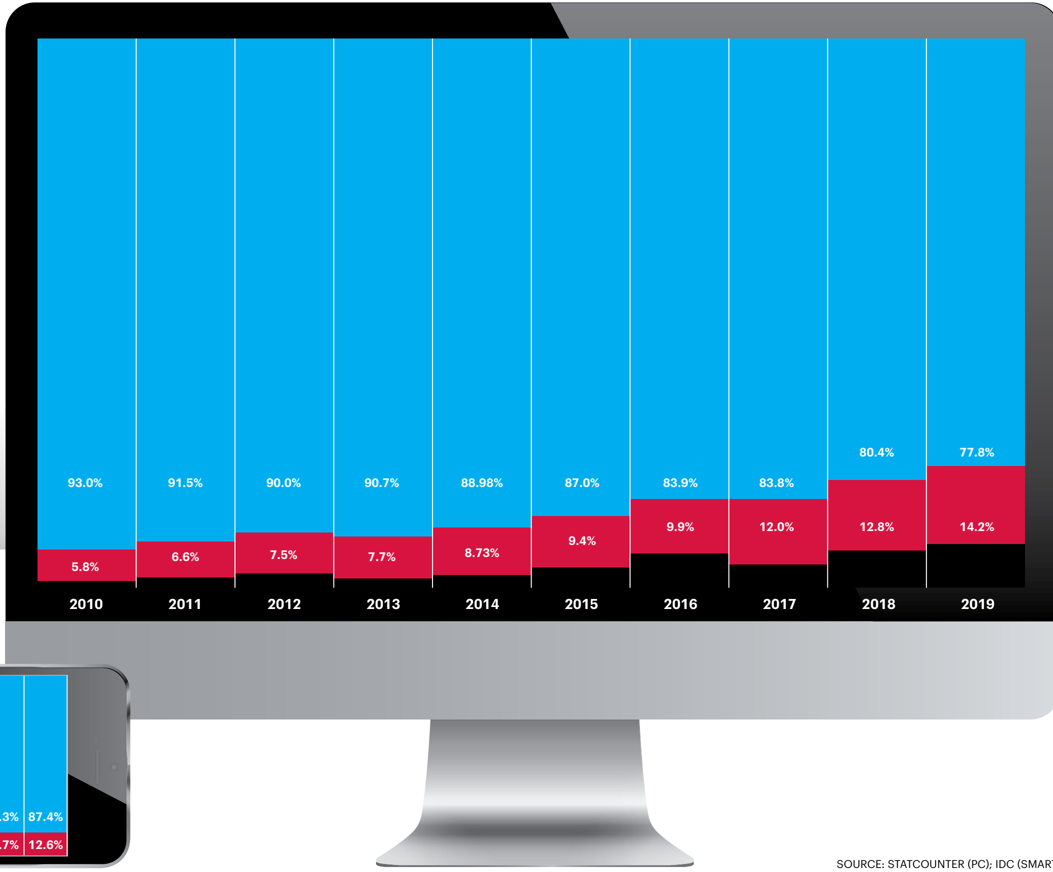
SOURCE: SENSOR TOWER

OPERATING SYSTEMS

RULER: **MICROSOFT**

Global PC Operating System Market Share

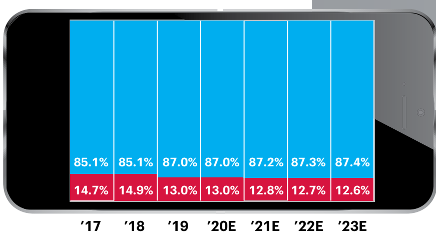
● Windows ● OS X ● Linux/Chrome OS/Other



While **Microsoft** is steadily losing some of its lead over Apple in the PC OS market, it still dwarfs the company in global usage, while Google is expected to increase its mobile OS strength at a much slower pace.

Global Smartphone Operating System Market Share & Forecast

● Android ● iOS

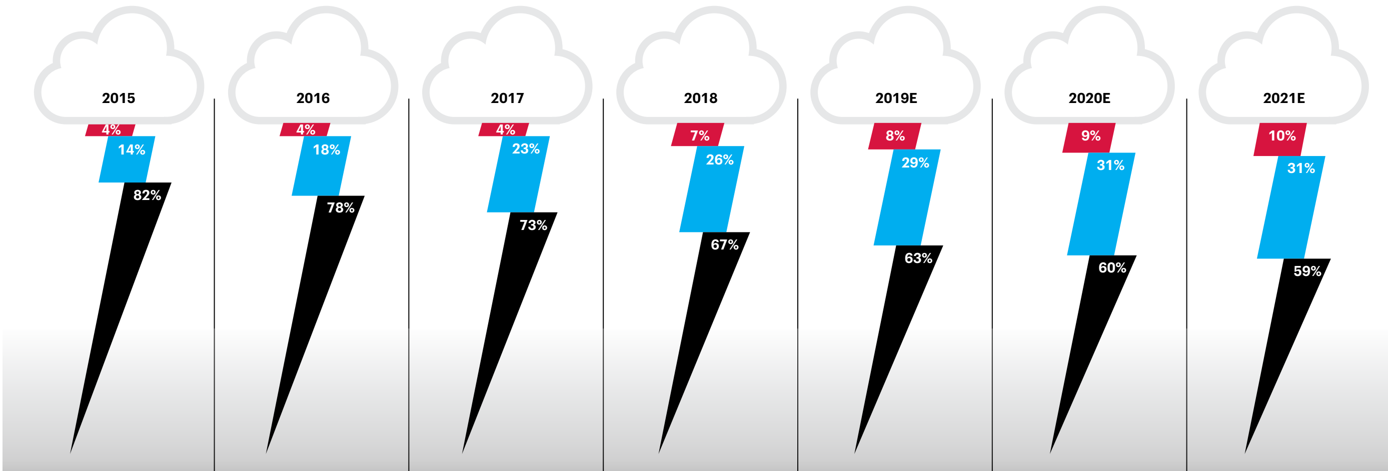


SOURCE: STATCOUNTER (PC); IDC (SMARTPHONE)

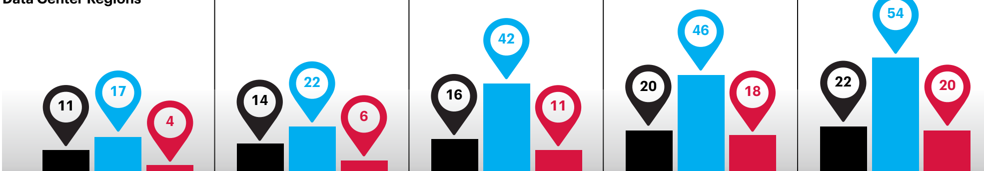
CLOUD SERVICES

RULER: **AMAZON**

Global Cloud Market Share Between Top 3 Vendors

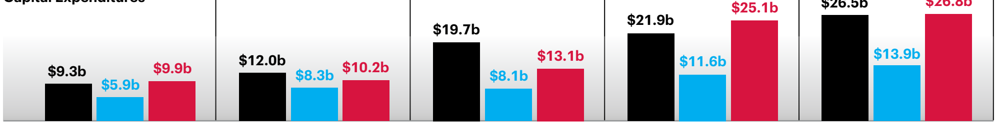


Data Center Regions



Amazon Web Services is the go-to provider for cloud infrastructure, but big tech neighbors are creeping in.

Capital Expenditures



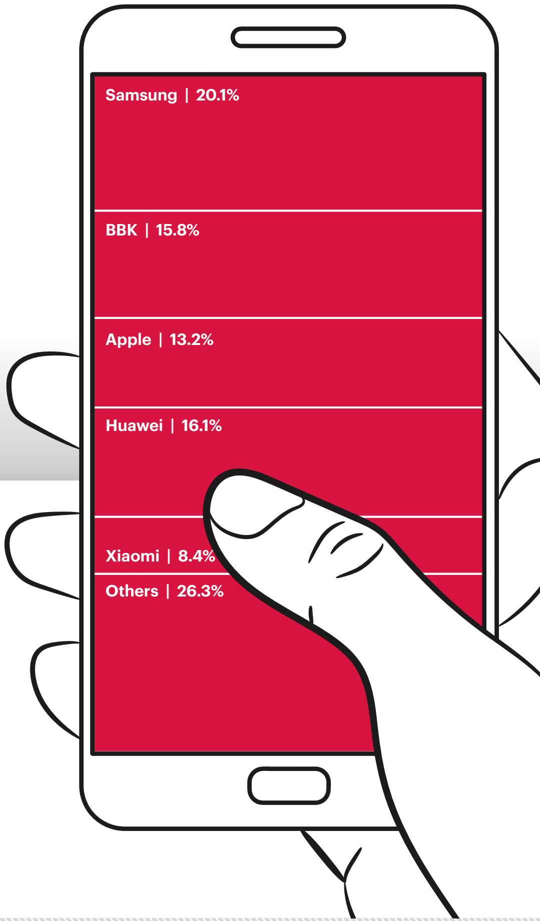
- Amazon Web Services
- Microsoft Azure
- Google Cloud

SOURCE: JEFFERIES, COMPANY REPORTS

SMARTPHONES

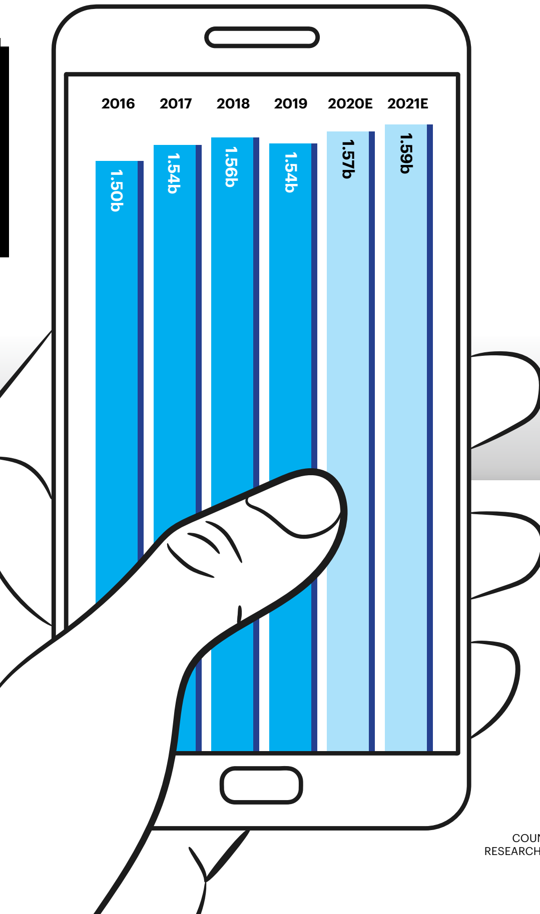
RULER: **SAMSUNG**

Annual Market Share of Smartphone Manufacturers

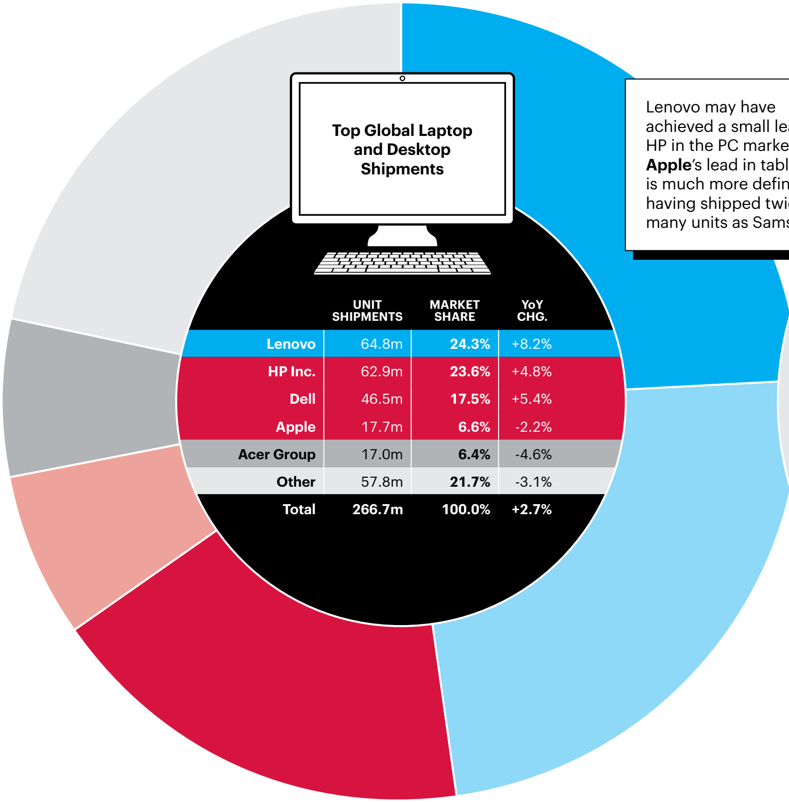


Chinese manufacturers are steadily pushing out smaller businesses and taking away from Apple's market share as they work to get closer to **Samsung**'s position at the top of the smartphone market.

Global Smartphone Sales Forecast by Units Sold



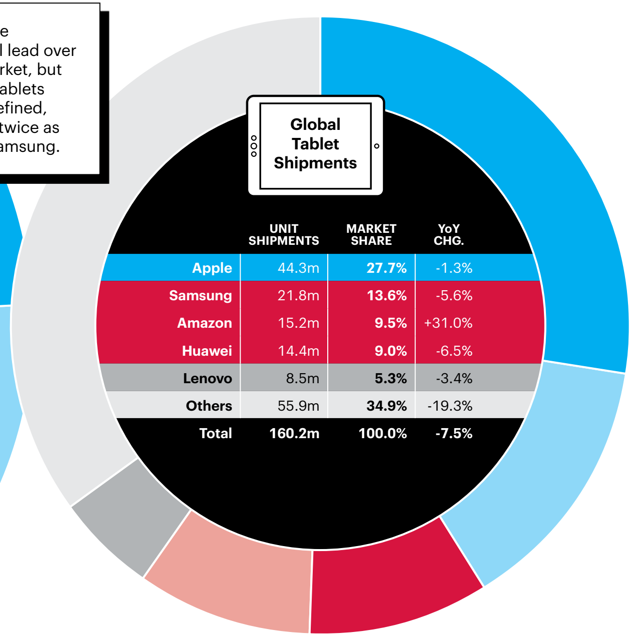
SOURCE: COUNTERPOINT RESEARCH, GARTNER



Top Global Laptop and Desktop Shipments

	UNIT SHIPMENTS	MARKET SHARE	YoY CHG.
Lenovo	64.8m	**24.3%**	+8.2%
HP Inc.	62.9m	**23.6%**	+4.8%
Dell	46.5m	**17.5%**	+5.4%
Apple	17.7m	**6.6%**	-2.2%
Acer Group	17.0m	**6.4%**	-4.6%
Other	57.8m	**21.7%**	-3.1%
Total	**266.7m**	**100.0%**	**+2.7%**

Lenovo may have achieved a small lead over HP in the PC market, but **Apple**'s lead in tablets is much more defined, having shipped twice as many units as Samsung.



Global Tablet Shipments

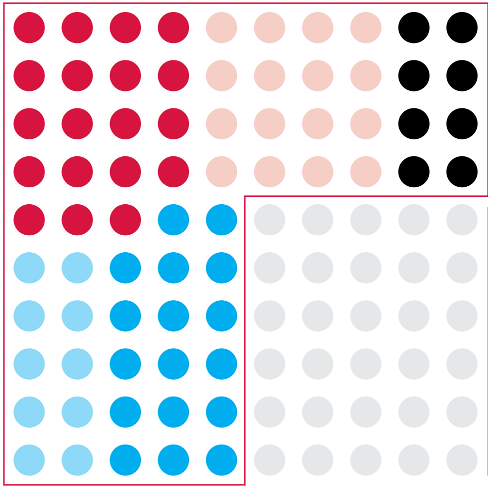
	UNIT SHIPMENTS	MARKET SHARE	YoY CHG.
Apple	44.3m	**27.7%**	-1.3%
Samsung	21.8m	**13.6%**	-5.6%
Amazon	15.2m	**9.5%**	+31.0%
Huawei	14.4m	**9.0%**	-6.5%
Lenovo	8.5m	**5.3%**	-3.4%
Others	55.9m	**34.9%**	-19.3%
Total	**160.2m**	**100.0%**	**-7.5%**

SOURCE: IDC (PCS 2019); STRATEGY ANALYTICS (TABLET 2019)

TV NETWORKS

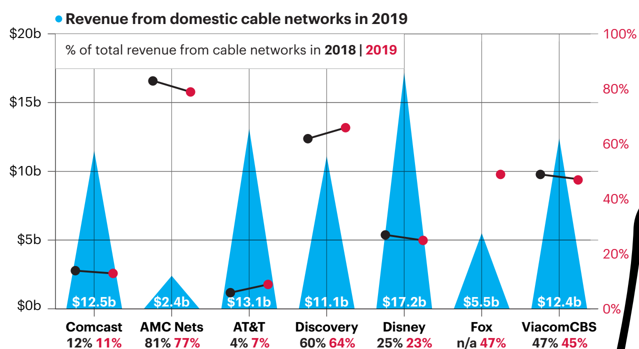
RULER: **DISNEY**

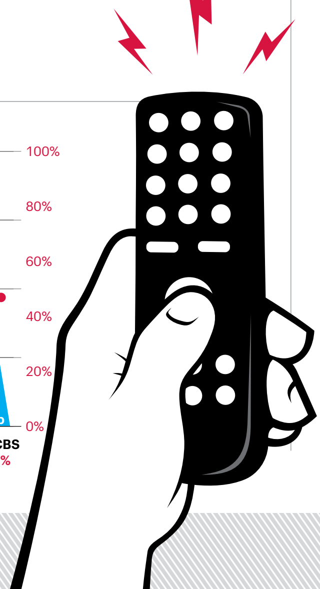
Disney still pulls in the most revenue from its channels, which accounts for nearly a quarter of all of its revenue even as it makes serious strides into the SVOD space.



70 of the Top 100 Are Controlled by Five Companies

Company	Nets Owned
Discovery	19
Disney/Disney Ownership Stake	17
ViacomCBS	16
Comcast	10
AT&T	8
Fox	5
AMC Networks	5
Sony	1
Independent	19





Top Cable Networks by Primetime Total Viewers

	Network	Owner
1	Fox News Channel	Fox
2	ESPN	Disney (80%)
3	MSNBC	Comcast
4	HGTV	Discovery
5	Hallmark Channel	Crown Media
6	TBS	AT&T
7	TNT	AT&T
8	USA	Comcast
9	CNN	AT&T
10	History	Disney (50%)
11	TLC	Discovery
12	A&E Network	Disney (50%)
13	ID	Discovery
14	Discovery	Discovery
15	Food Network	Discovery
16	TV Land	ViacomCBS
17	FX	Disney
18	AMC	AMC Networks
19	Bravo	Comcast
20	INSP	Inspiration Ministries
21	Lifetime	Disney (50%)
22	Hallmark Movies & Mysteries	Crown Media
23	Freeform	Disney
24	Adult Swim	AT&T
25	Syfy	Comcast

SOURCES: NIELSEN (OWNERS); COMPANY REPORTS (REVENUE)

TV STATIONS

RULER: **NEXSTAR**

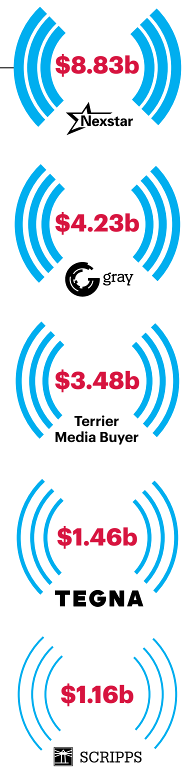
NEXSTAR	SINCLAIR	TEGNA	FOX	VIACOMCBS	COMCAST	GRAY
NUMBER OF STATIONS						
197	191	49	17	29	11	109
% US COVERAGE (BY DMA)						
63%	39%	39%	38%	38%	37%	24%
TOTAL REVENUE (2019)						
$3.0b	$4.2b	$2.3b	$11.4b	$15.3b	$103.7b	$2.1b
BROADCAST REVENUE						
$3.0b	$2.7b	$2.3b	$2.4b	$2.2b	$2.1b	$2.0b
BROADCAST REVENUE FROM ADVERTISING						
$1.4b	$1.3b	$1.3b	$1.6b	$1.5b	$1.4b	$1.2b
BROADCAST REVENUE FROM RETRANS FEES						
$1.4b	$1.3b	$0.8b	$0.8b	$0.7b	$0.7b	$0.8b
% BROADCAST REVENUE CONTRIBUTES TO TOTAL REVENUE						
100%	63%	100%	21%	14%	2%	96%
% RETRANS/DISTRIBUTION CONTRIBUTES TO TOTAL REVENUE						
45%	32%	37%	7%	5%	1%	38%

SOURCE: COMPANY REPORTS, BIA ADVISORY SOURCES (FOX, VIACOMCBS & NBCU, AND US COVERAGE #S); COMPANY WEBSITES

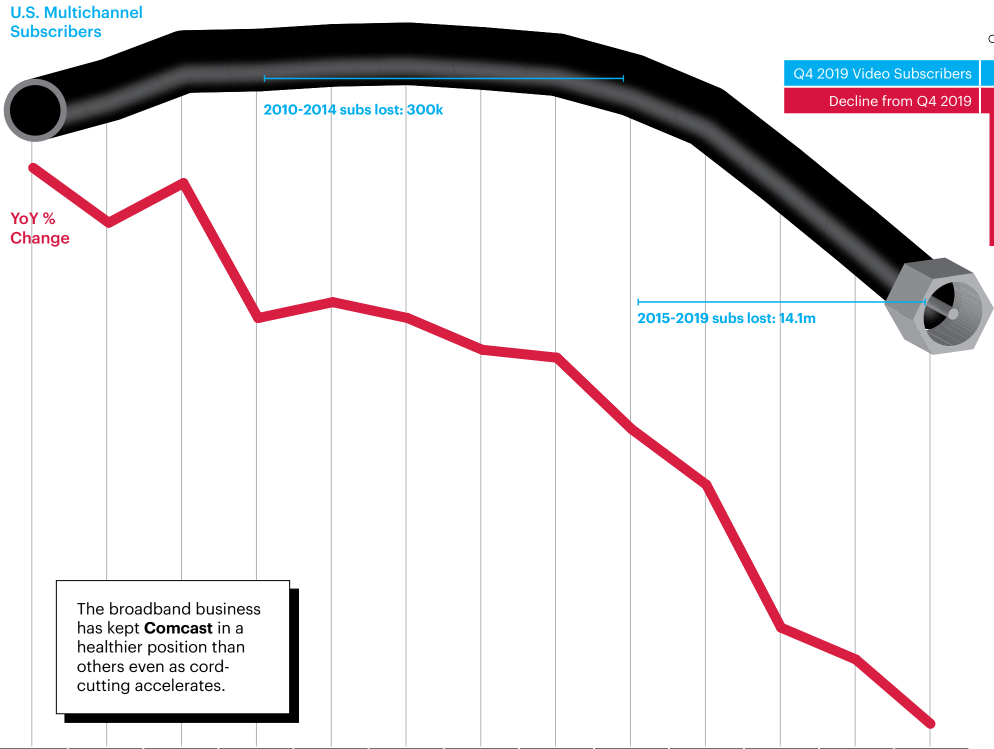
Nexstar has cemented its position as the leading and largest network of stations thanks to an acquisitions tab more than double its rivals, pulling in the most broadcast revenue for 2019.

Five companies accounted for 96% of local station acquisition activity between 2015 and 2019

Cost of Acquisitions



PAY TV



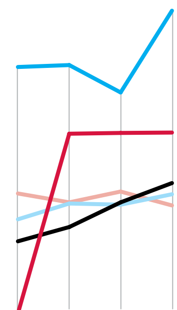
The broadband business has kept **Comcast** in a healthier position than others even as cord-cutting accelerates.

2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
98.0m	99.3m	101.1m	101.2m	101.5m	101.6m	101.3m	100.9	99.6	97.6	93.9m	90.0m	85.5m
2.0%	1.3%	1.8%	0.1%	0.3%	0.1%	-0.3%	-0.4%	-1.3%	-2.0%	-3.8%	-4.2%	-5.0%

AT&T accounted for the bulk of cord cutting in 2019

	Comcast	AT&T	Charter	dish	verizon	altice
Q4 2019 Video Subscribers	19.9m	18.8m	15.6m	9.0m	4.1m	3.1m
Decline from Q4 2019	-388k	-717k	-70k	-382k	-84k	-41k

ARPU for cable systems is increasing even as total subscribers decline



	2016	2017	2018	2019
AT&T (includes VMVPD)	$1,428	$1,433	$1,362	$1,574
Altice USA	$789	$1,255	$1,257	$1,258
Charter	$976	$1,013	$1,077	$1,127
Comcast	$1,033	$1,074	$1,071	$1,098
Dish (includes Sling TV)	$1,100	$1,077	$1,105	$1,069

SOURCE: S&P KAGAN; COMPANY FILINGS (Q4)

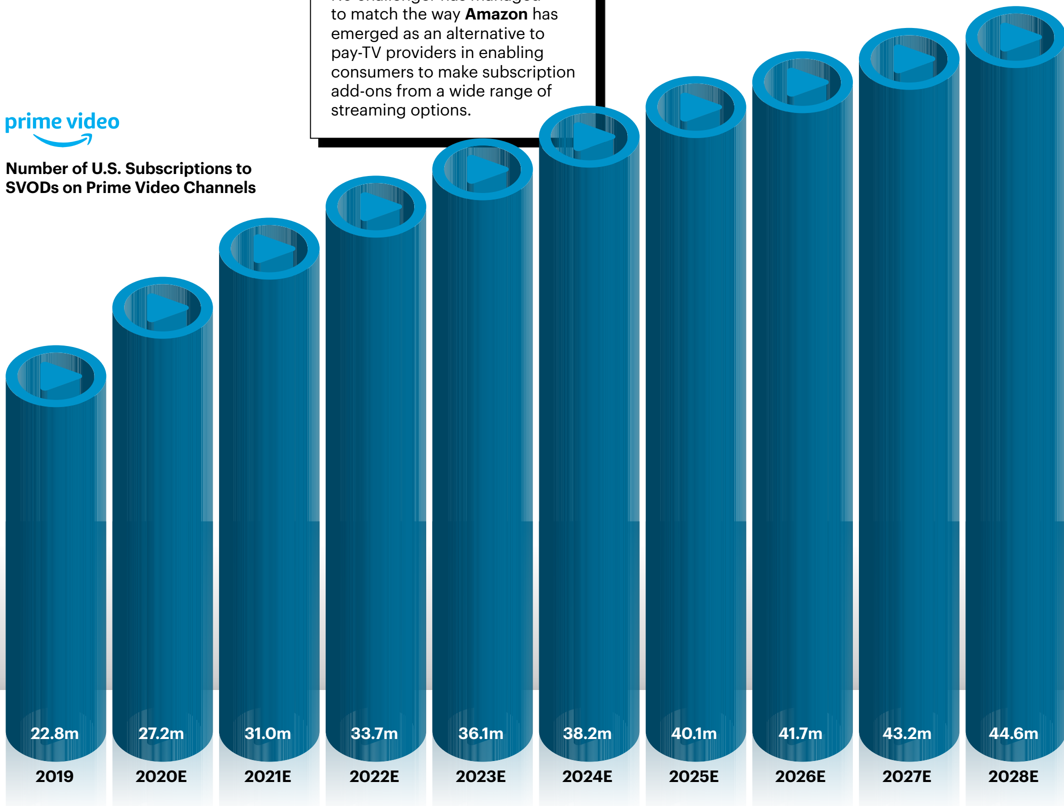
SVOD AGGREGATORS

RULER: **AMAZON**

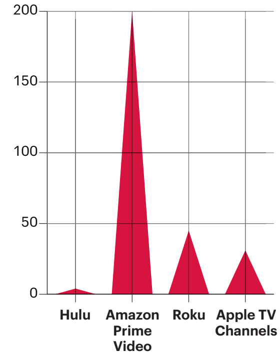
No challenger has managed to match the way **Amazon** has emerged as an alternative to pay-TV providers in enabling consumers to make subscription add-ons from a wide range of streaming options.

prime video

Number of U.S. Subscriptions to SVODs on Prime Video Channels

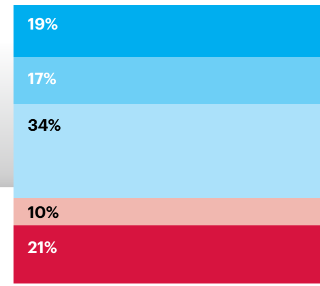


Number of SVODs offered



Respondents' level of interest in aggregating all paid subscriptions into a single interface

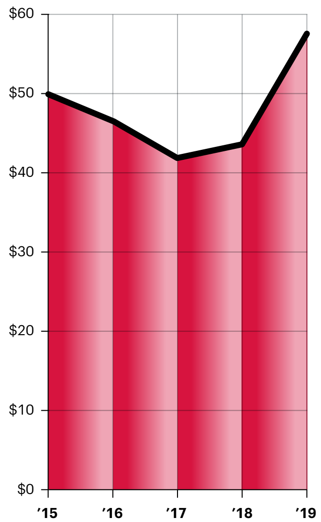
Not at all interested ← → Very interested



SOURCE: BMO CAPITAL MARKETS, MAR 2020 (PRIME CHANNEL SUBSCRIPTIONS); TECHCRUNCH, THE INFORMATION, ROKU, MACWORLD, VARIETY (SVODS OFFERED); MAGID, MAY 2019 (DEMAND); NOTE: HULU SVODS OFFERED FIGURE REPRESENTS PREMIUM NETWORK ADD-ONS, NOT COUNTING LIVE TV NETWORK ADD-ONS. PRIME VIDEO FIGURE IS APPROXIMATE AS OF JAN 2019. ROKU FIGURE IS AS LISTED ON THE ROKU CHANNEL AS OF JANUARY 2020.

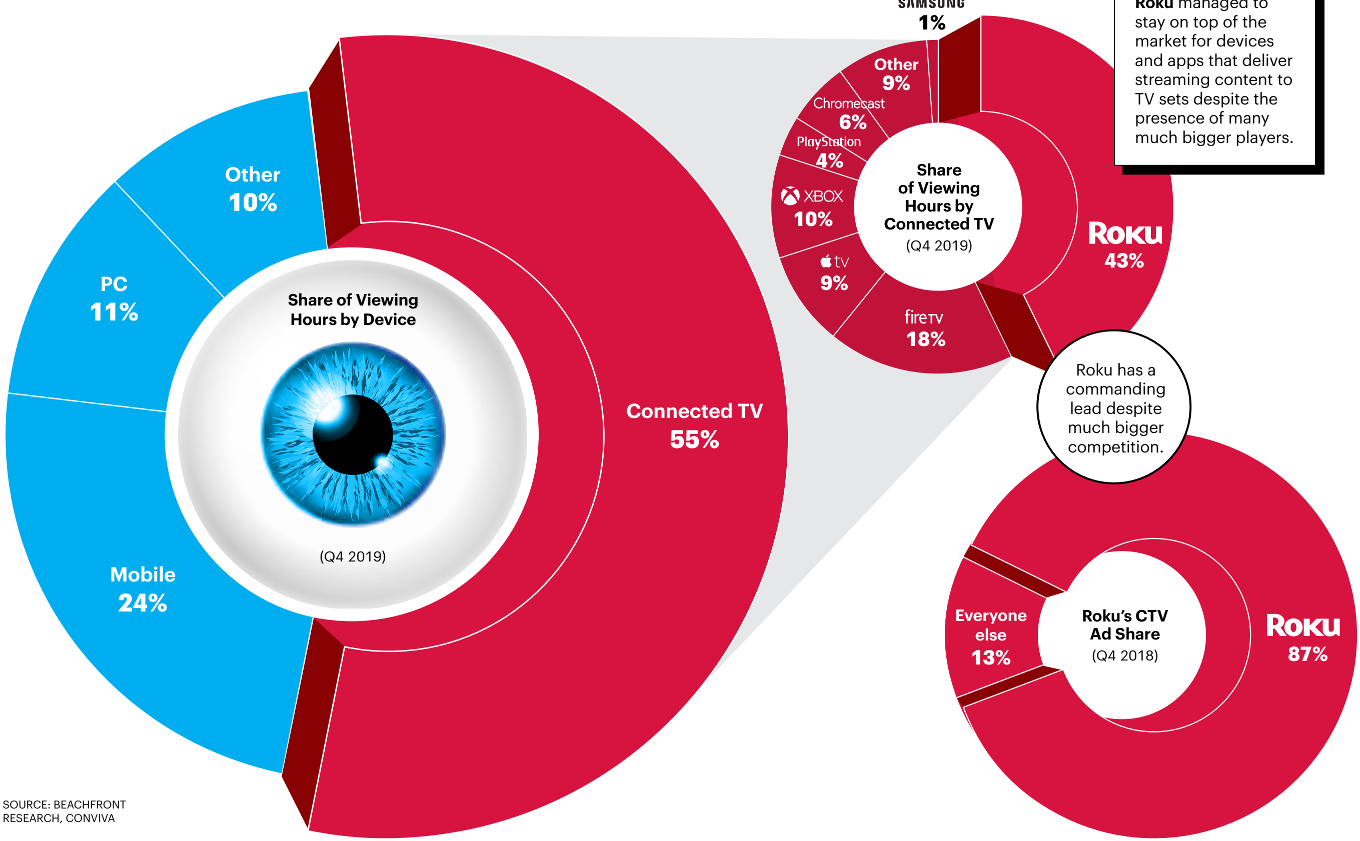
In Hulu With Live TV, **Disney** has acquired the controlling share of the market leader in a dwindling category bogged down by bloated pricing.

The mean cost for a VMVPD package increased by $14.08 (32%) in 2019



	HULU WITH LIVE TV	SLING TV	YOUTUBE TV	AT&T TV NOW	AT&T WATCH TV	FUBO TV	PHILO
OWNER	Disney / Comcast*	Dish TV	Google	AT&T	AT&T	FaceBank	Investors include **A&E Networks**, **AMC Networks**, **Discovery** and **ViacomCBS**
SUBSCRIBERS	3.3m (Q1 2020)	2.3m (Q1 2020)	2m (Q4 2019)	788k (Q1 2020)	500k (Q4 2018)	316k (Q4 2019)	50k (Q4 2017E)
PRICE(S) AT LAUNCH	$40	$20-$40	$35	$35-$70	$15	$45	$16-$20
PRICE(S) CURRENTLY	$55	$30-$45	$50	$65-$80	$15	$55	$20
# OF NETWORKS	69+	32-53	80+	45-60+	35+	100+	59
LAUNCH DATE	May 2017	February 2015	February 2017	November 2016	June 2018	April 2017	November 2017

SOURCE: COMPANY WEBSITES *COMCAST OWNS 33%



Roku managed to stay on top of the market for devices and apps that deliver streaming content to TV sets despite the presence of many much bigger players.

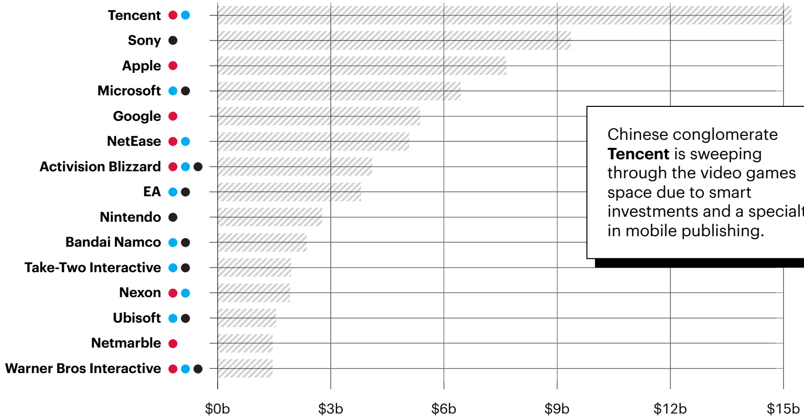
Roku has a commanding lead despite much bigger competition.

SOURCE: BEACHFRONT RESEARCH, CONVIVA

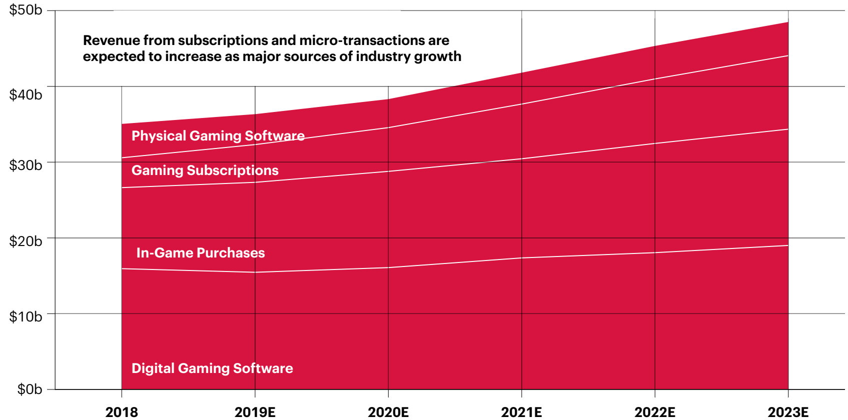
GAME PUBLISHERS

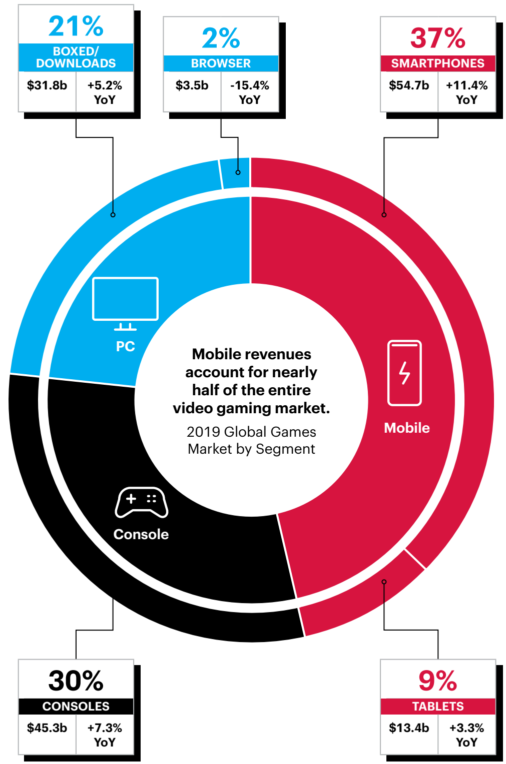
2019 Game Revenues at Top Public Companies in Video Game Space, Q1-3

Sector Specialty: Mobile, PC, Console



Chinese conglomerate **Tencent** is sweeping through the video games space due to smart investments and a specialty in mobile publishing.



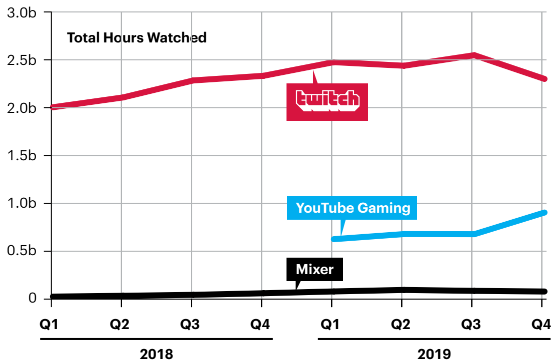


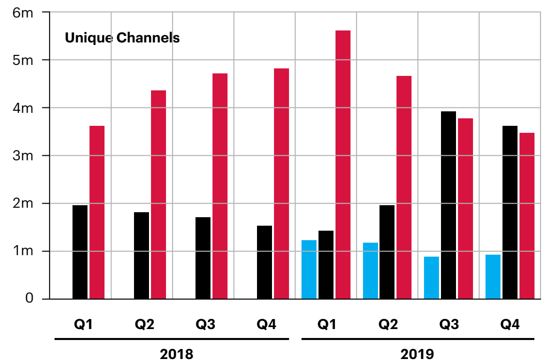
SOURCE: NEWZOO, COMPANY REPORTS (REVENUE); NEWZOO (MARKET SHARE); CTA (INCREASE); NOTE: DATA IS COMBINATION OF ISOLATED AND ESTIMATED REVENUES BASED OFF OF QUARTERLY/ANNUAL FINANCIAL REPORTS. REVENUE DERIVED ENTIRELY FROM HARDWARE SALES HAS BEEN EXCLUDED FOR RELEVANT COMPANIES, WHEN POSSIBLE

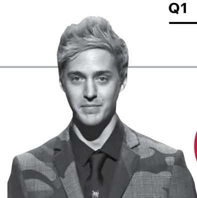
LIVESTREAMING

RULER: **AMAZON**

Amazon's Twitch is still the undeniable livestreaming victor, but its viewing numbers aren't enough to prevent the biggest streamers from getting lured over to rivals.












Twitch Migration: Notable Streamers

	Ninja	shroud	King Gothalion	CouRage	Disguised Toast	FaZe Ewok	Corinna Kopf	Valkyrae
Moved to:	**Mixer**	**Mixer**	**Mixer**	**YouTube Gaming**	**Facebook Gaming**	**Mixer**	**Facebook Gaming**	**YouTube Gaming**
Date Moved	August 2019	October 2019	October 2019	November 2019	November 2019	November 2019	December 2019	January 2020
Twitch Followers	14,688,717	7,034,875	1,004,347	2,107,684	1,312,340	284,733	414,865	944,561
Current Followers	2,851,771	980,007	145,879	2,000,000	216,000	128,769	244,000	849,000
Notable Games	Fortnite	PUBG, Apex Legends	Overwatch	Fortnite, Call of Duty	Hearthstone, Teamfight Tactics	Fortnite	Fortnite	Various

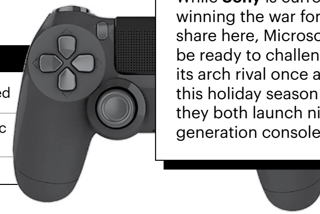
NEWZOO, STREAMLABS (HOURS, CHANNELS), POLYGON, KOTAKU, CNN MONEY, STREAMER ACCOUNT PAGES (MIGRATION)

GAME CONSOLES

RULER: **SONY**

The Next Generation of Consoles

MICROSOFT'S XBOX SERIES X		SONY'S PLAYSTATION 5
Entire back catalog confirmed	**BACKWARDS COMPATIBILITY**	PS4 confirmed, back catalog rumored
Solid-state storage, xCloud expected to launch alongside/shortly after Series X	**NEW FEATURES**	Segmented game installation, haptic controllers, solid-state storage
14 (9 within past three years)	**1ST PARTY DEV STUDIOS**	14 (1 within past three years)

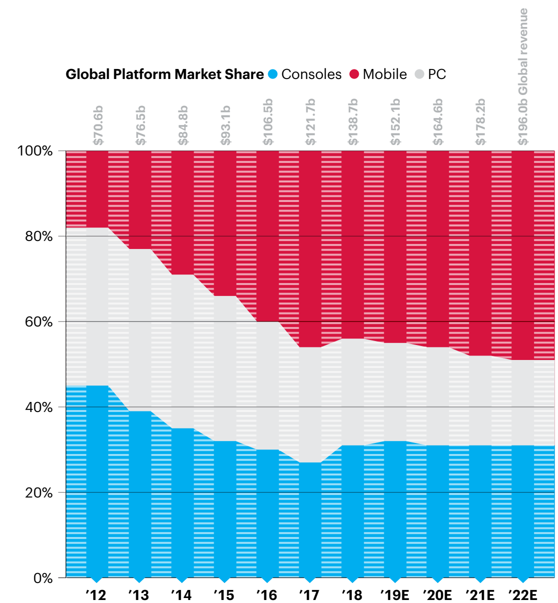


While **Sony** is currently winning the war for market share here, Microsoft will be ready to challenge its arch rival once again this holiday season when they both launch ninth-generation consoles.

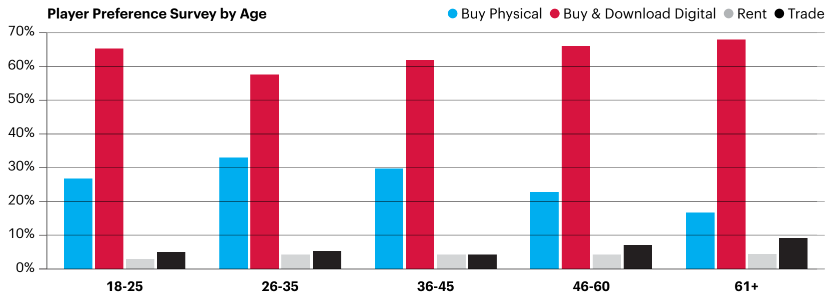
Unit Sales by Console

● Sony ● Microsoft ● Nintendo ■ Current Generation

CONSOLE	TYPE	RELEASE	UNIT SALES
PlayStation 2	Home	2000	**157.68m**
Nintendo DS	Handheld	2004	**154.02m**
Game Boy (Standard + Color)	Handheld	1989 / 1998	**118.69m**
PlayStation 4	Home	2013	**107.31m**
PlayStation	Home	1994	**102.50m**
Wii	Home	2006	**101.63m**
PlayStation 3	Home	2006	**87.41m**
Xbox 360	Home	2005	**85.80m**
Game Boy Advance	Handheld	2001	**81.51m**
PSP	Handheld	2004	**81.09m**
Nintendo 3DS	Handheld	2011	**75.71m**
NES	Home	1983	**61.91m**
Nintendo Switch	Hybrid	2017	**52.48m**
SNES	Home	1990	**49.10m**
Xbox One	Home	2013	**46.65m**
Nintendo 64	Home	1996	**32.93m**
GameCube	Home	2001	**21.74m**
PS Vita	Handheld	2011	**16.21m**
Xbox	Home	2001	**15.77m**
Wii U	Home	2012	**13.56m**

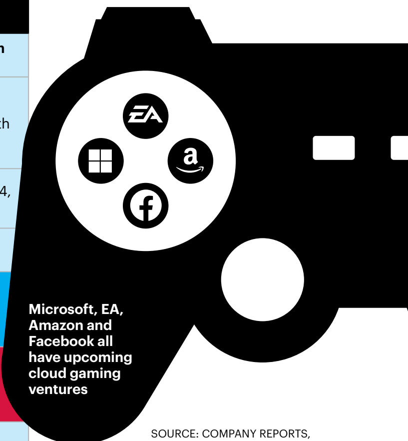


SOURCE: VGCHARTZ, COMPANY REPORTS, NINTENDO (UNIT SALES); CNET, GAMASUTRA (PS5 VS. XBOX); NEWZOO (MARKET SHARE)



Sony's PlayStation Now is the only successful example in this nascent category largely because it's available as an add-on subscription to existing PlayStation customers and is the only cloud service that combines downloads and streaming.

	EA	MICROSOFT	GOOGLE	APPLE	NVIDIA	UBISOFT	TENCENT	SONY
Service	**Access**	**Xbox Game Pass**	**Stadia**	**Arcade**	**GeForce Now**	**Uplay+**	**Start & WeGame**	**PlayStation Now**
Price	**$4.99**/month	**$9.99**/month	**$129** base, controllers extra / **$9.99**/ month for Pro membership	**$4.99**/month	**Free** / Premium: **$5**/month	**$14.99**/month	n/a	**$9.99**/month
Platform	Xbox One, PlayStation 4, Steam	Xbox One, Windows	Chrome-compatible devices	Apple devices	Nvidia Shield, Windows, macOS, Android	Windows	PCs	PlayStation 4, Windows
Initial Release	2014	2017	2019	2019	2015 (beta) 2020 (full)	2019 (beta)	2019 (beta, China)	2014
Streaming Available			●		●		●	●
Downloads Available	●	●		●		●		●
Available Games	**85**	**409**	**46** (current & upcoming)	**100+**	**1,500+**	**100+**	n/a	**800+**



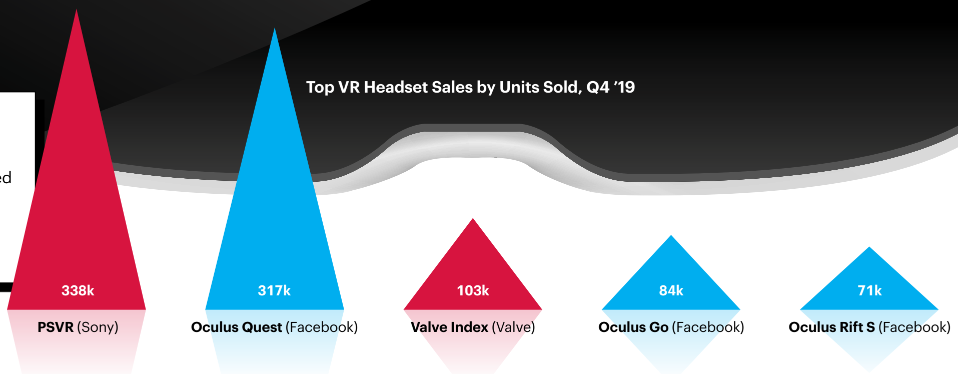
Microsoft, EA, Amazon and Facebook all have upcoming cloud gaming ventures

SOURCE: COMPANY REPORTS, CNET, POCKETGAMER.BIZ, GAMESINDUSTRY.BIZ, VG247 (MARKET); LIMELIGHT NETWORKS (PLAYER PREFERENCE)

Overview of VR Headsets in the Market

	MADE BY (PARENT)	SEGMENT	COST	REQUIRED HARDWARE	COMPATIBLE STORES	RELEASE YEAR
Gear VR	Oculus (Facebook)/Samsung	Mobile	$130	Android Phone	Oculus Store	2015
Rift	Oculus (Facebook)	PC	$399	PC meeting specifications	Oculus Store/Steam	2016
Vive	HTC	PC	$499	PC meeting specifications	Steam/Viveport	2016
PlayStationVR	PlayStation (Sony)	Console	$299	PlayStation 4	PlayStation Network	2016
Daydream	Google	Mobile	$99	Android phone	Play Store	2016
Vive Pro	HTC	PC	$799	High-end PC or laptop	Steam/Viveport	2018
Go	Oculus (Facebook)	Standalone	$199	Smartphone (set-up only)	Oculus Store	2018
Quest	Oculus (Facebook)	Standalone	$399	None	Oculus Store	2019

Top VR Headset Sales by Units Sold, Q4 '19



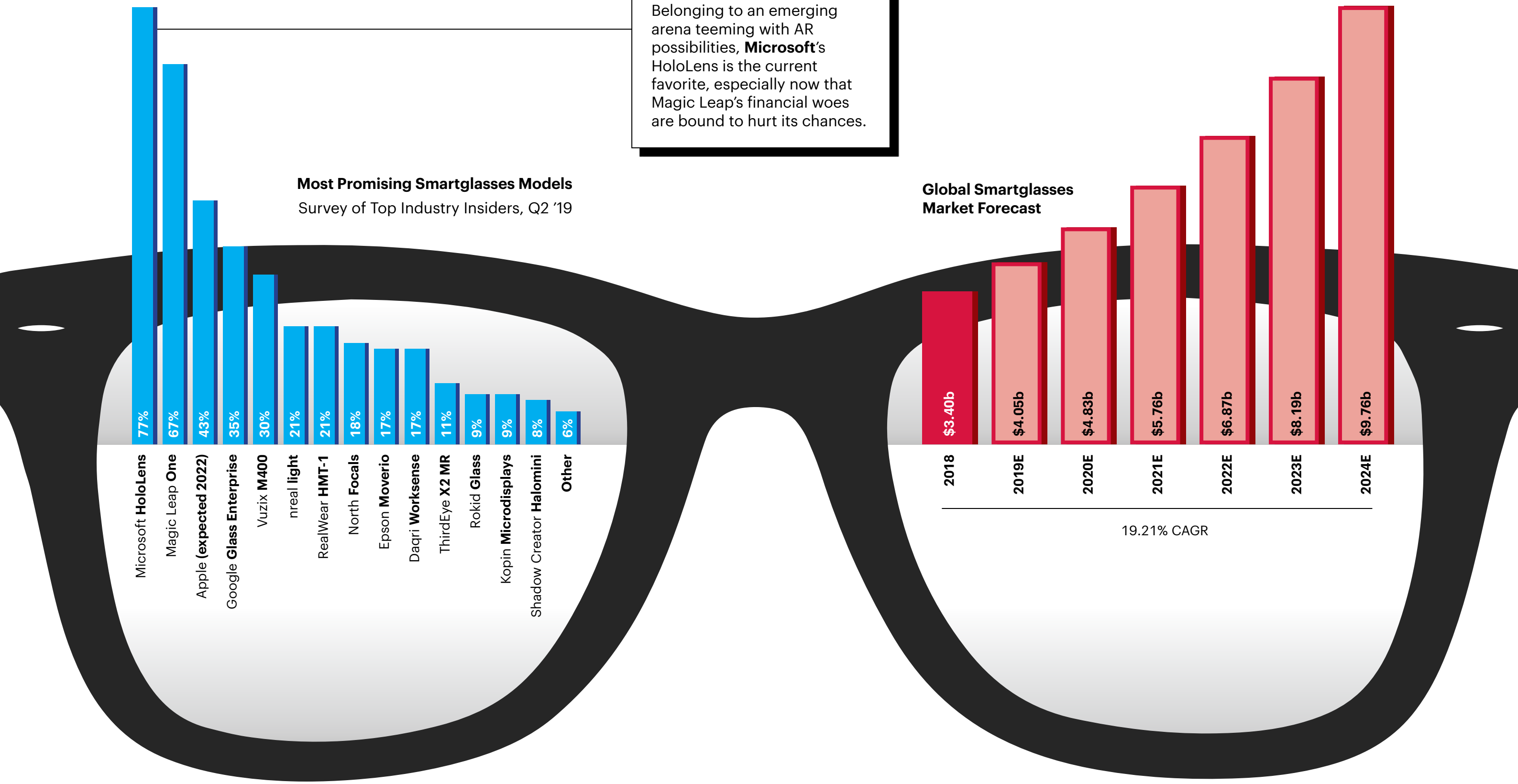
While Sony's PSVR is the best-selling individual VR headset, **Facebook** has a suite of products, propelled by the latest version of Oculus Quest, that have a greater collective share of this market.

SOURCE: NEWZOO (OVERVIEW); SUPERDATA (SALES)

SMARTGLASSES

RULER: **MICROSOFT**

Belonging to an emerging arena teeming with AR possibilities, **Microsoft**'s HoloLens is the current favorite, especially now that Magic Leap's financial woes are bound to hurt its chances.



SOURCE: DIGI-CAPITAL/AWE (SURVEY); MARKET RESEARCH REPORTS (MARKET FORECAST)

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