



**2008 UNIVERSITY OF FLORIDA
LATIN AMERICAN BUSINESS SYMPOSIUM**

***HBO AND THE NEW MEDIA REVOLUTION
IN LATIN AMERICA***

**November 7, 2008
Gainesville, Florida**

HBO Latin America Group

- **A JOINT VENTURE OWNED BY:**
 - **TIME WARNER INC. (HBO; WARNER BROS.)**
 - **SONY CORPORATION (COLUMBIA PICTURES)**
 - **THE WALT DISNEY COMPANY (WALT DISNEY PICTURES)**
 - **OLE COMMUNICATIONS GROUP**
- **FOUNDED IN 1991 WITH THE LAUNCH OF *HBO*[®] THE FIRST PAN-REGIONAL PREMIUM PAY TELEVISION CHANNEL IN LATIN AMERICA**
- **TODAY = 20 PREMIUM AND BASIC CHANNELS; 23 COUNTRIES; 16+ MILLION SUBSCRIBERS**

HBO

HBO
plus.

HBO
Family™

HBO
LATIN AMERICA
GROUPSM

max *prime*

cine **max**™

HBO | **HD**SM



a SONY PICTURES ENTERTAINMENT company



a SONY PICTURES ENTERTAINMENT company



THE HISTORY CHANNEL.

CLIENTS

- **MAJOR CABLE/SATELLITE PAY TV SYSTEMS**

- **CABLEVISION (ARGENTINA)**
- **CABLEVISION (MEXICO)**
- **DIRECTV LATIN AMERICA**
- **INTERCABLE (VENEZUELA)**
- **MULTICANAL (ARGENTINA)**
- **NET SERVIÇOS (BRASIL)**
- **SKY BRASIL**
- **SKY MEXICO**
- **VTR (CHILE)**

- **NEW ENTRANTS – TELCOS (TELEFONICA;
TELMEX)**

- **7 LOCATIONS IN 5 COUNTRIES:**

- **BUENOS AIRES, ARGENTINA**
- **CARACAS, VENEZUELA (2 LOCATIONS)**
- **CORAL GABLES, FLORIDA (HQ)**
- **MEXICO CITY, MEXICO**
- **SÃO PAULO, BRAZIL**
- **SUNRISE, FLORIDA**

- **APPROXIMATELY 500 EMPLOYEES**

- **50+ SEPARATE FEEDS UPLINKED TO TWO SATELLITES FROM TECHNICAL FACILITIES IN CARACAS & SUNRISE**

CONTENT

• **BLOCKBUSTERS FROM TOP HOLLYWOOD STUDIOS (*COLUMBIA; WALT DISNEY; WARNER BROS.*) + INDIES:**

- ***THE DARK KNIGHT***
- ***HARRY POTTER***
- ***PIRATES OF THE CARIBBEAN***
- ***SPIDERMAN***
- ***THE LORD OF THE RINGS***
- ***THE MATRIX***
- ***THE ILLUSIONIST***
- ***THE LIVES OF OTHERS***

- **SERIES FROM *HOME BOX OFFICE, INC.* & OTHERS**

- ***THE SOPRANOS***
- ***BAND OF BROTHERS***
- ***BIG LOVE***
- ***ROME***
- ***ENTOURAGE***
- ***MAD MEN***

- **SPORTING EVENTS SUCH AS *HBO WORLD CHAMPIONSHIP BOXING***

- **SPECIALS SUCH AS *BLACK EYED PEAS, JUSTIN TIMBERLAKE, MADONNA CONCERTS***

**•ALSO CURRENTLY PRODUCING &
DISTRIBUTING ORIGINAL SERIES IN OUR
TERRITORY IN SPANISH & PORTUGUESE:**

- ALICE* (BRAZIL)**
- CAPADOCIA* (MEXICO)**
- EPITAFIOS* (ARGENTINA)**
- FILHOS DO CARNAVAL* (BRAZIL)**
- MANDRAKE* (BRAZIL)**
- SEXO URBANO* (VARIOUS CITIES IN LATIN
AMERICA AND BRAZIL)**

**•*CAPADOCIA, EPITAFIOS, FILHOS, MANDRAKE,
SEXO URBANO* ALL HAVE AIRED ON HBO USA**

New Media In Latin America

Family Living Room c. 1960



Family Living Room 2008



Next Generation Living Room



- OTA
- CABLE
- DTH
- FIBER
- IPTV



- DVD
- BLU-RAY
- HD-DVD



- DVR/
Tivo
- VOD
- PS3
- XBOX



- BROAD
BAND
- IPOD
- CELL
PHONE
- PSP
- SLINGBOX

New Media Trends Ten Years Before . . .

Voice

=



Video

=



Data

=



...Ten Years After

Voice →

Video →

Data →



- **LATIN AMERICA IN THE MIDST OF AN ACCELERATING NEW MEDIA TRANSFORMATION**

- **OVER THE AIR BROADCAST MIGRATING TO DIGITAL**
- **CABLE OPERATORS UPGRADING NETWORKS TO OFFER INTERACTIVE BROADBAND SERVICES**
- **TELCOS ENTERING VIDEO MARKET THROUGH DTH AND UPGRADING NETWORKS TO OFFER IPTV**
- **DTH LEVERAGING EXISTING DIGITAL PLATFORM TO DELIVER ADDITIONAL SERVICES SUCH AS HD**
- **STRATEGIC ALLIANCES AMONG RIVALS**

- **CONSUMERS WILL HAVE ACCESS TO ALL NEW TECHNOLOGIES – HD; VOD; IPTV; BROADBAND; MOBILE**

- **WILL BE OFFERED BUNDLED “TRIPLE PLAY” PACKAGE – VOICE, VIDEO & DATA**

- **TV, PHONE & COMPUTER WILL CONVERGE**

•HDTV –

–SALES OF HDTV READY TV SETS HAS SKYROCKETED:

- BRAZIL – MORE THAN 1MM IN 2007, A 266% INCREASE OVER 2006**
- CHILE – 139,000 IN 2007 (127% INCREASE)**
- MEXICO – 720,000 IN 2007 (134% INCREASE)**

**–2008 = 177,000 TV HOUSEHOLDS RECEIVE HD SIGNAL;
CLIMB TO 4.6MM BY 2012 (3.2% OF TV HOUSEHOLDS)**

•IPTV

**–IPTV SUBS EXPECTED TO GROW FROM 215,000 IN
2008 TO 2.3MM IN 2012 (2% OF ALL TV HOUSEHOLDS)**

- **BROADBAND (WEB) TV**

- **NUMBER OF SERVICES OFFERING WEB BASED TV HAS EXPLODED**

- **HULU (FOX/UNIVERSAL JV)**
 - **JOOST**
 - **iTUNES**
 - **TERRATV**

- **MOBILE**

- **400MM MOBILE USERS IN LATIN AMERICA ALREADY;
73% OF TOTAL POPULATION**

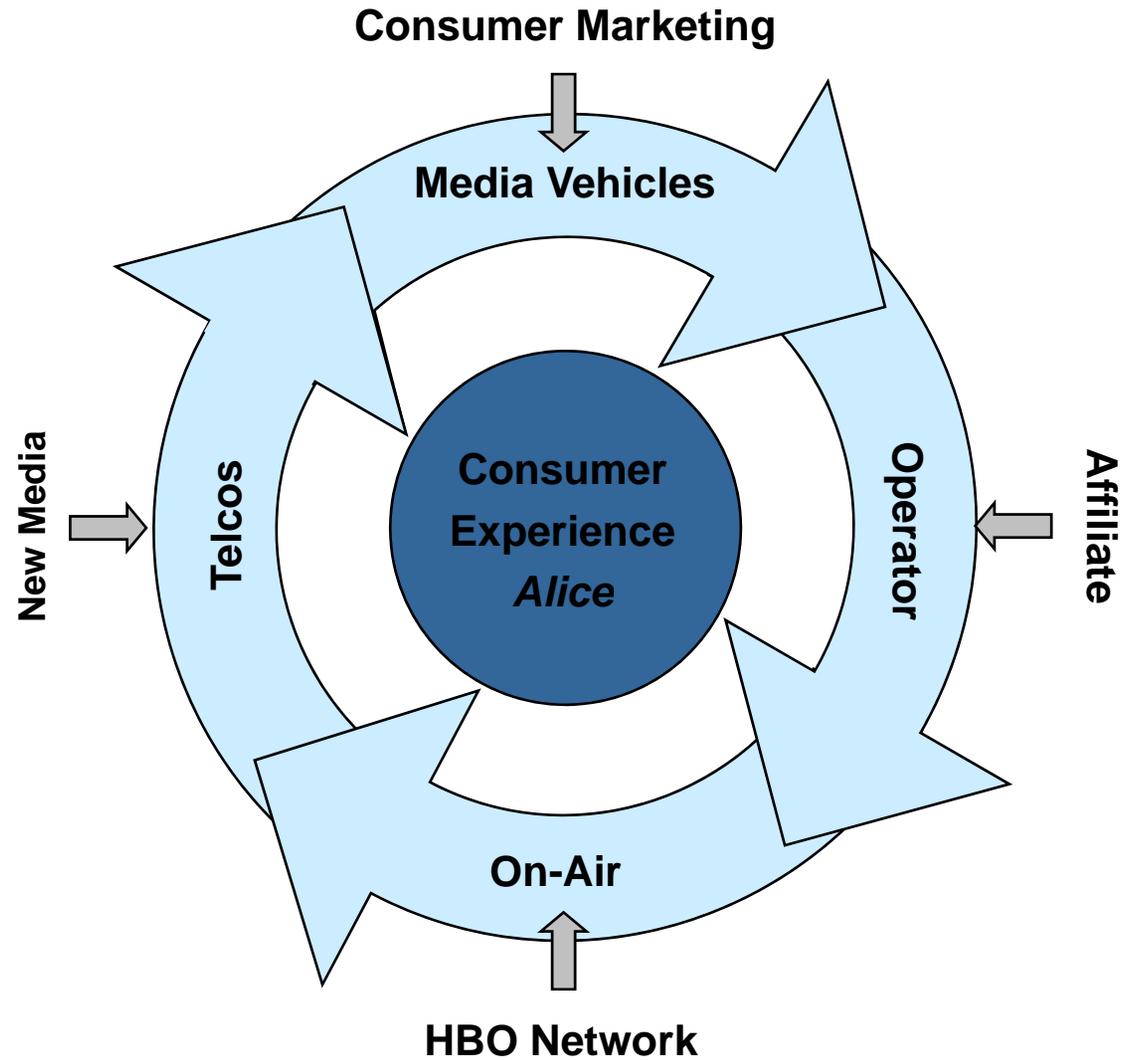
- **WILL GROW TO 530MM (89%) BY 2012**

- **VIDEO CAPABLE PHONES NOW MORE THAN 53%**

HBO Response

- **USE ORIGINAL PRODUCTIONS AS SPEARHEAD (EXCLUSIVE CONTENT; BROADER RIGHTS)**
- **CREATE DIFFERENT VARIATIONS OF SAME CONTENT FOR DIFFERENT MEDIA**
 - **HD FORMAT FOR LINEAR CHANNELS**
 - **ON DEMAND COMPLEMENT**
 - ***MOBISODES* FOR MOBILE**
 - **SPECIAL FOOTAGE, INTERACTIVE CONTENT FOR WEB**
- **PROMOTE ACROSS ALL MEDIA**
 - **ON AIR ON LINEAR CHANNELS**
 - **SPECIAL WEB PAGES**
 - **RING TONES, TEXT MESSAGES FOR MOBILE**

ALICE - 360° BRAND STRATEGY



HBO® PRESENTA
SU NUEVA SERIE ORIGINAL

Alice

UNA NUEVA CARA
EN LA CIUDAD

UNA HISTORIA EMPIEZA

21 DE SEPTIEMBRE

HBO



www.alice-hbo.tv

SERIES ÚNICAS. CALIDAD SIN COMPARACIÓN.

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- LAUNCHED SEPTEMBER 21, 2008 PAN-REGIONALLY
 - 13 ONE-HOUR EPISODES
 - TARGET AUDIENCE 18-34
 - 360 DEGREE APPROACH
- MIX TRADITIONAL AND ALTERNATIVE MEDIA
 - STRONG INTERACTIVE DIGITAL MEDIA COMPONENT
 - HEAVY ON/OFF-AIR PROMOTIONAL SUPPORT
- SÃO PAULO INTEGRAL TO SERIES AND CAMPAIGNS (NEW YORK IN *SEX AND THE CITY*)

INTERNET



- First episode streamed on-line
- Mini-Site
 - Visitors can access 120 bits of content:
 - *Alice* avatar
 - Ringtones, screen-savers
 - Video clips, behind the scenes, images
 - Blogs, chat rooms
 - *Pasos de Alice* highlights São Paulo's hot spots

MOBILE PORTAL



- Portal permits users to download *free* exclusive *Alice* content from mobile phones
 - 55 1-minute videos
 - Wallpapers
 - Ringtones
 - Photos
 - Blogs

EPIISODE ALERTS



- Each week, audiences receive a tune-in reminder from *Alice*
- Link to mobile portal

LOCATION VIDEO TOUR



- Sao Paulo as a character in the series
 - Posters placed in key locations used in the filming
- How will it work?
 - Participants send an SMS text, receiving in exchange a picture of the scene shot at the location

HBBO[®]

ve más allá
