

The Technology of Broadcast Television and Its Impact

Past, Present and Future

Glenn Reitmeier

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Introduction

- Not a technology historian ... a student of analog TV development history
- Not an economist ... observe market adoption data and trace technology roots
- TV Technologist
 - worked on improving analog broadcasts and receivers
 - leader in digital television standards (ATSC and ATSC 3.0)

...A Technology Perspective on (U.S.) TV Broadcast Standards and Their Impact...

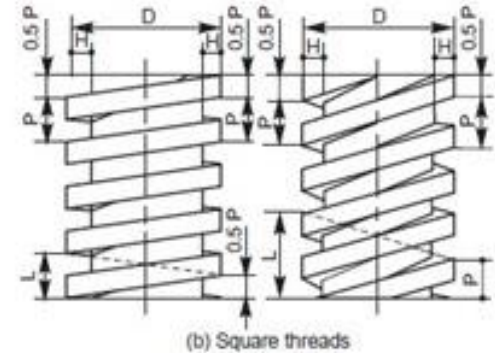
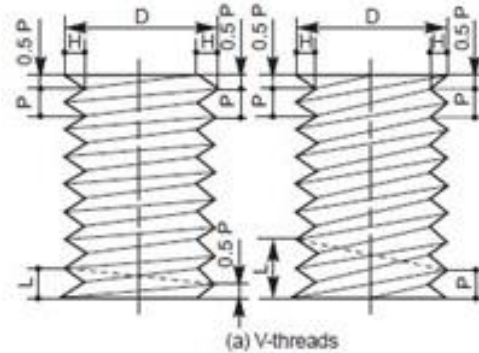
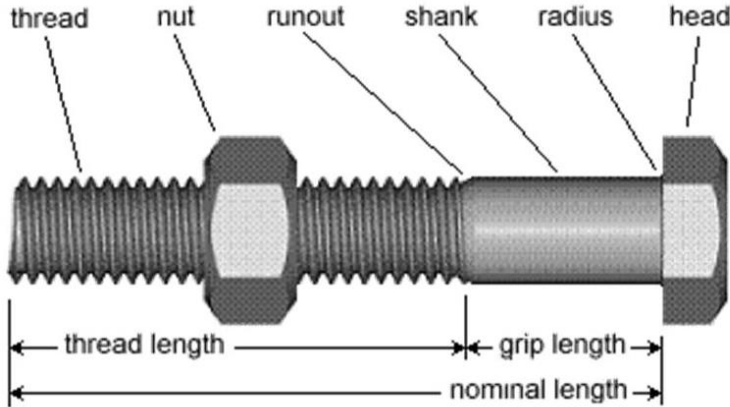
Outline

- Background – The Importance of Standards
- Monochrome Television (NTSC monochrome standard)
 - Goals ... Challenges ... Innovations ... History ... Technology ... Adoption ... Impact
- Color Television (NTSC color standard)
 - Goals ... Challenges ... Innovations ... History ... Technology ... Adoption ... Impact
- Digital HDTV (ATSC Standard)
 - Goals ... Challenges ... Innovations ... History ... Technology ... Adoption ... Impact
- Next-Gen TV (ATSC 3.0 Standard)
 - Goals ... Challenges ... Innovations ... History ... Technology ... Adoption
- Future Predictions

The Importance of Standards

Standards

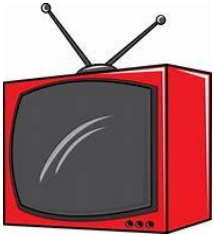
...every manufactured item in the modern world is based on technical standards...



Compatible ... Interchangeable ... Interoperable

Broadcast Standards

...specify the signal that is sent by a transmitter to receivers...

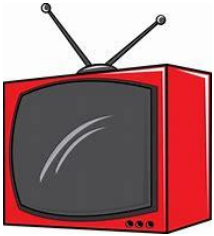


TV Stations can be received by different manufacturers' TVs



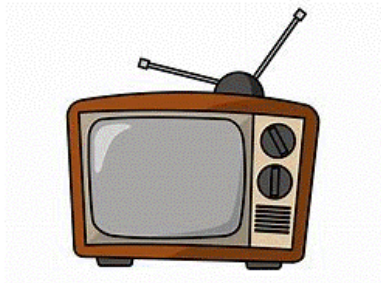
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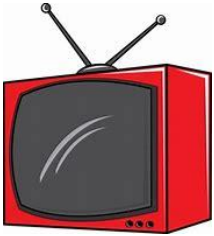
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Consumers' TV can receive different TV Stations



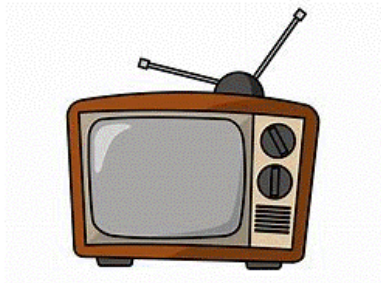
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Consumers' TV can receive different TV Stations

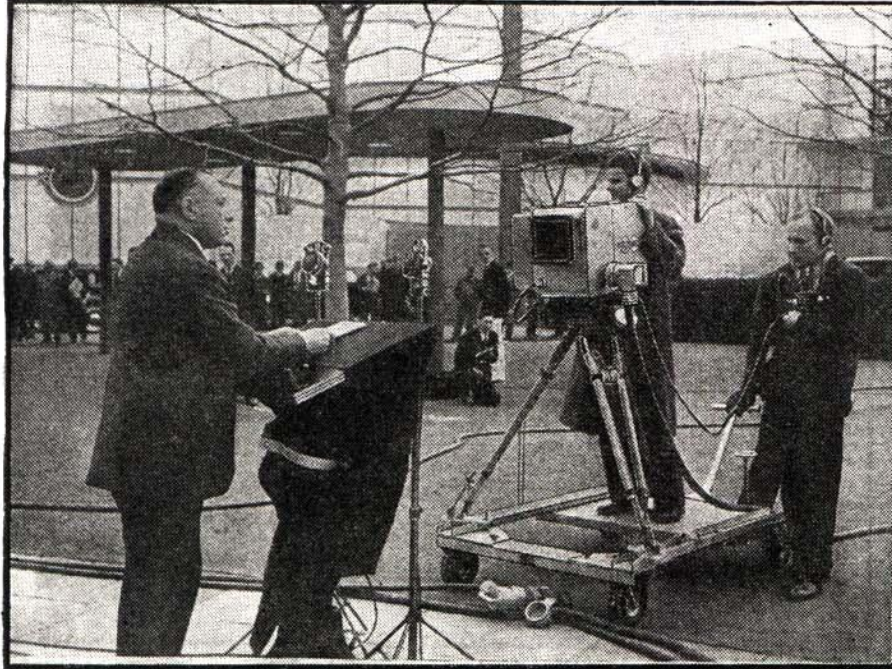


Monochrome Television

Television Goals

1920s – 1930s

...add sight to sound...



DAVID SARNOFF WAS PHOTOGRAPHED . . . AND TELEVISED, AT THE N. Y. WORLD'S FAIR

It's a downright fib to say "the camera doesn't lie," at least insofar as it concerns catching on a photographic film the same sort of image our eye perceives when viewing the phosphorescent end of a cathode-ray television receiving tube. *Radio-Craft* can attest, from having witnessed by television 8 miles away the dedication program, in connection with the RCA Exhibit Building, at which these photos were taken, that the image photo at top-right (and reproduced on cover) does not convey the same impression of "photo fidelity" which was experienced when the image was viewed directly on any one of 15 receivers. The reasons for this result are given elsewhere in this department.

Television Technology Challenges

- 280x more information than radio (4.2 MHz vs. 15 kHz)
- 200x more radio spectrum (6 MHz vs. 30 kHz)
- High Power Transmitters, High Antennas
- Rooftop receive antennas
- Affordable receivers
- Multiple Systems Proposed



Typical Tube Radio c. 1930s



A vintage advertisement for the Viewtone Company. It features a woman in a blue floral dress standing next to a large, wooden-cased television set. The TV has a small screen and a large speaker grille. Above the TV, a sign reads "AT HOME WITH THE WORLD VIEWTONE COMPANY TELEVISION LOW-COST TELEVISION-DESIGNED FOR YOUR HOME!". To the left, a smaller sign says "Place your order now! No Deposit Required Approximately Price 100.". At the bottom, the Viewtone logo is shown on the left and right, with the text "VIEWTONE COMPANY 203 E. 18th St. NEW YORK 3, N.Y." in the center.

Television Technology Race

1936 – RMA Standard

- In 1936, the Radio Manufacturers Association (RMA) proposed that U.S. television channels be standardized by the FCC
- 6 MHz bandwidth
- 441-line, interlaced, 30 frame-per-second system
- 2.8 MHz visual bandwidth
- AM audio

1939 RCA TRK-9



(c) TVhistory.TV Library

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1941: NTSC Standard

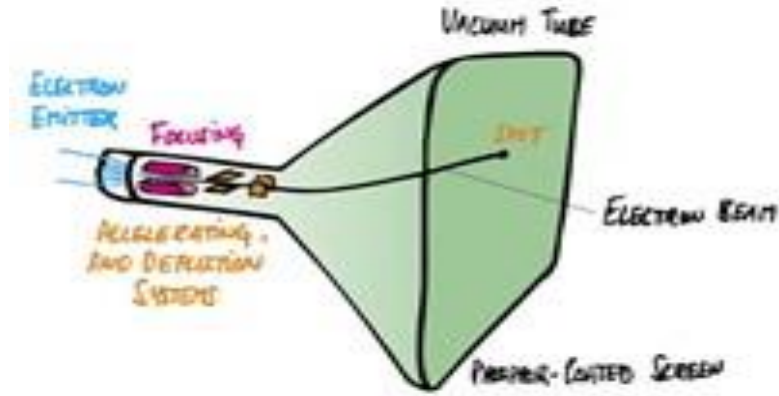
National Television Systems Committee

- 6 MHz bandwidth
- Vestigial Sideband modulation
- 525-line, interlaced, 30 frame-per-second television system
- 4:3 picture aspect ratio
- FM audio

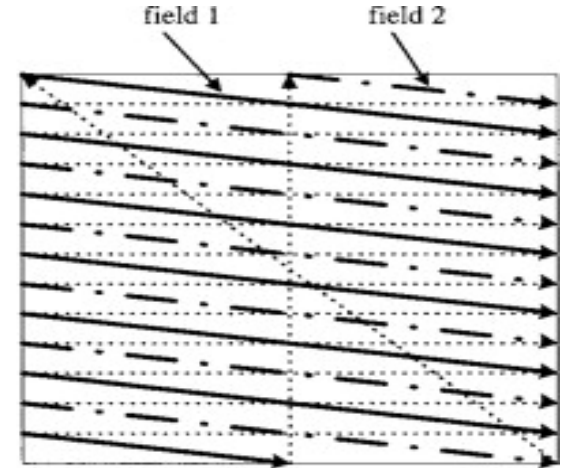
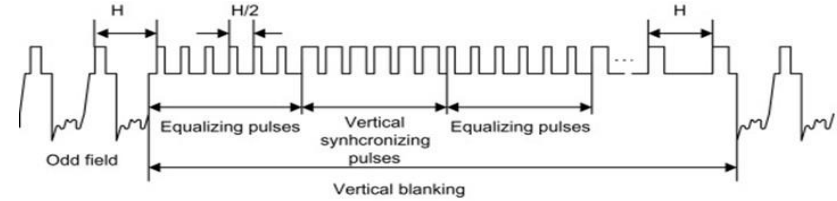
(after great debates about the relative benefit of increased horizontal resolution vs. the number of scan lines)

Monochrome TV Technology Innovations

1930s – 1990s: Analog Video Signals Based on Tubes



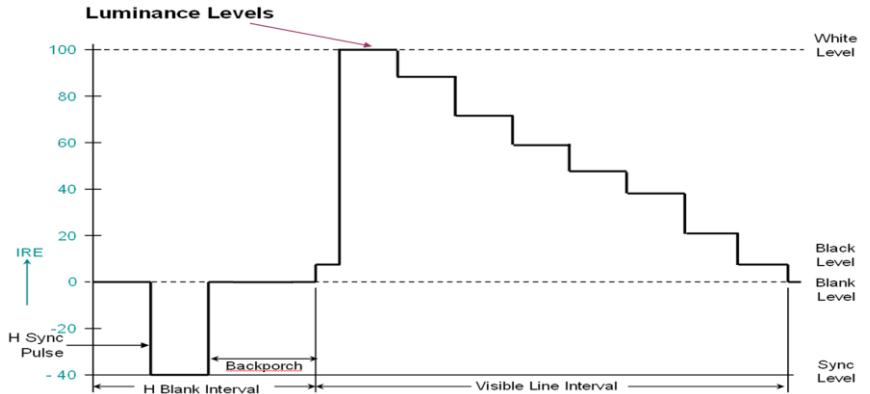
- CRT electron beam – spot brightness and location controlled by broadcast signal
- Interlaced scan avoided display flicker
- 525-line (480 visible), 60 Hz system



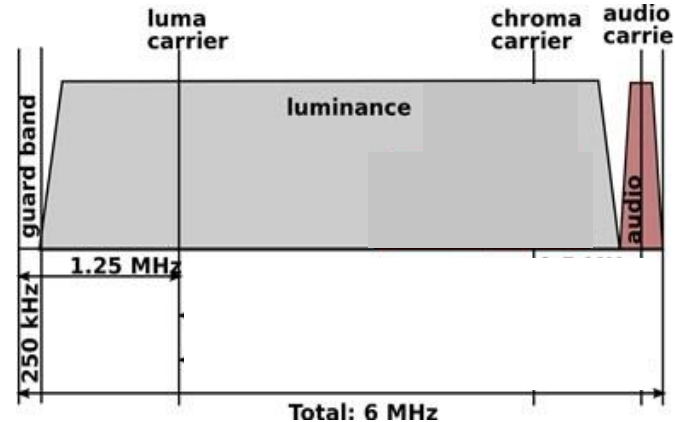
Interlaced
480 visible scan lines (525 total)

More Monochrome TV Technology Innovations

1940s – 1950s

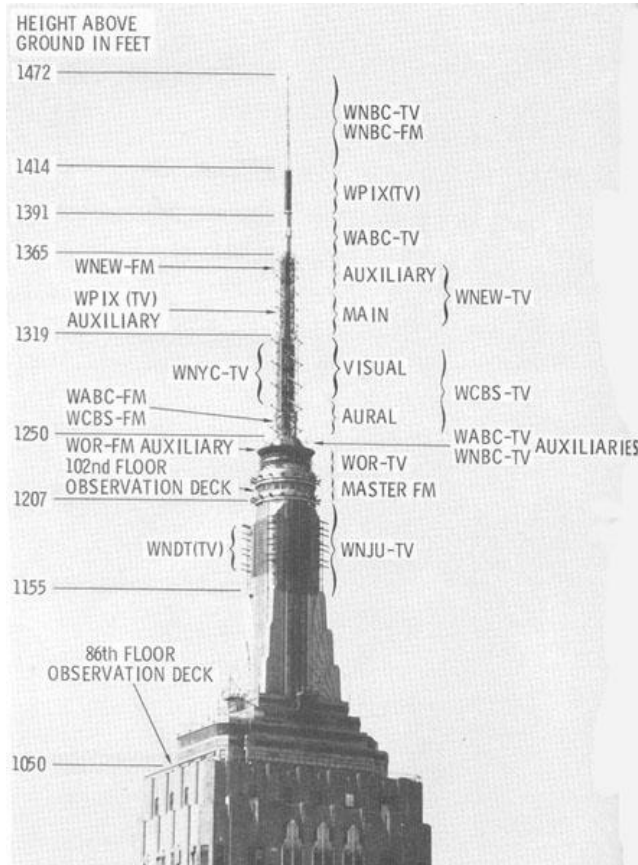


- “Gamma corrected” signal accounts for nonlinearity in CRT brightness – coincidentally aligned with human perception
- Vestigial Sideband Transmission for spectrum efficiency
- Inverted RF signal for power efficiency



Analog Television Broadcast Standards

1942: NTSC Monochrome National Television Systems Committee

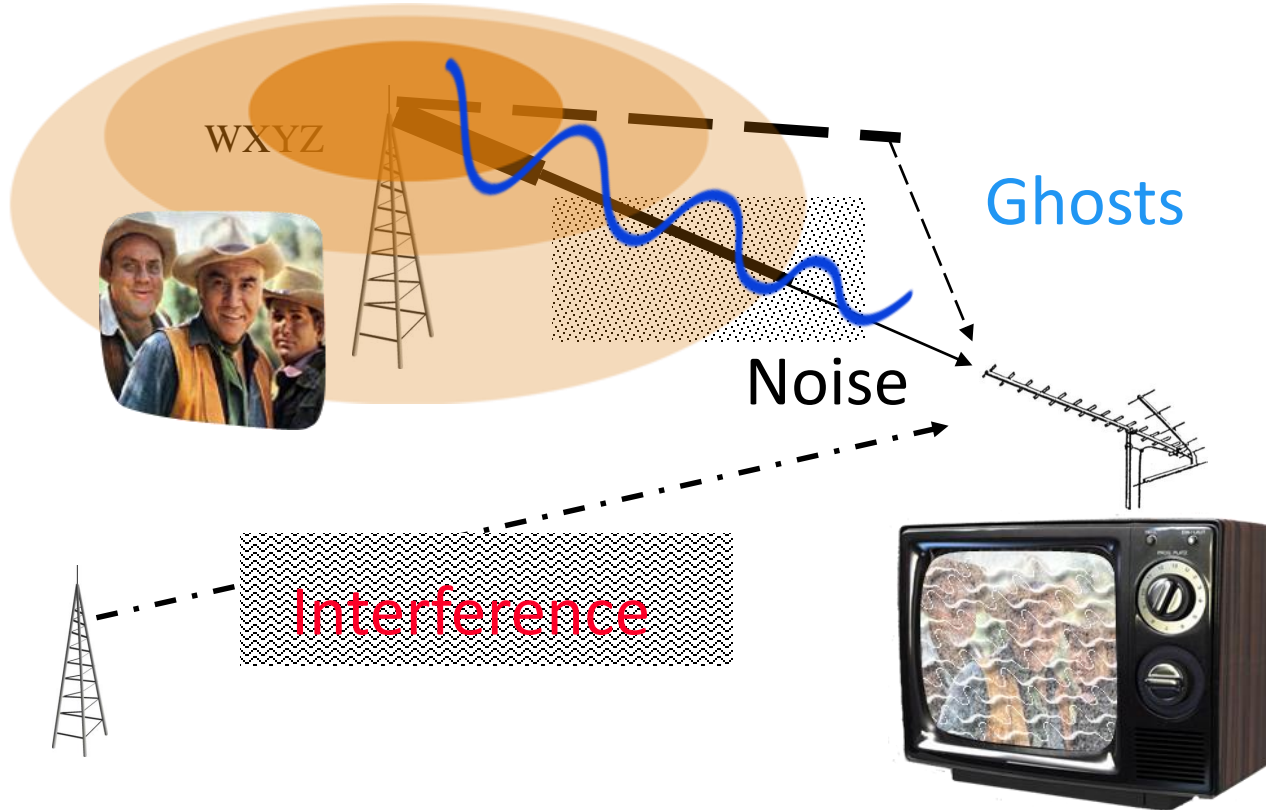


1949 RCA (USA)
10" Screen - Model T-100



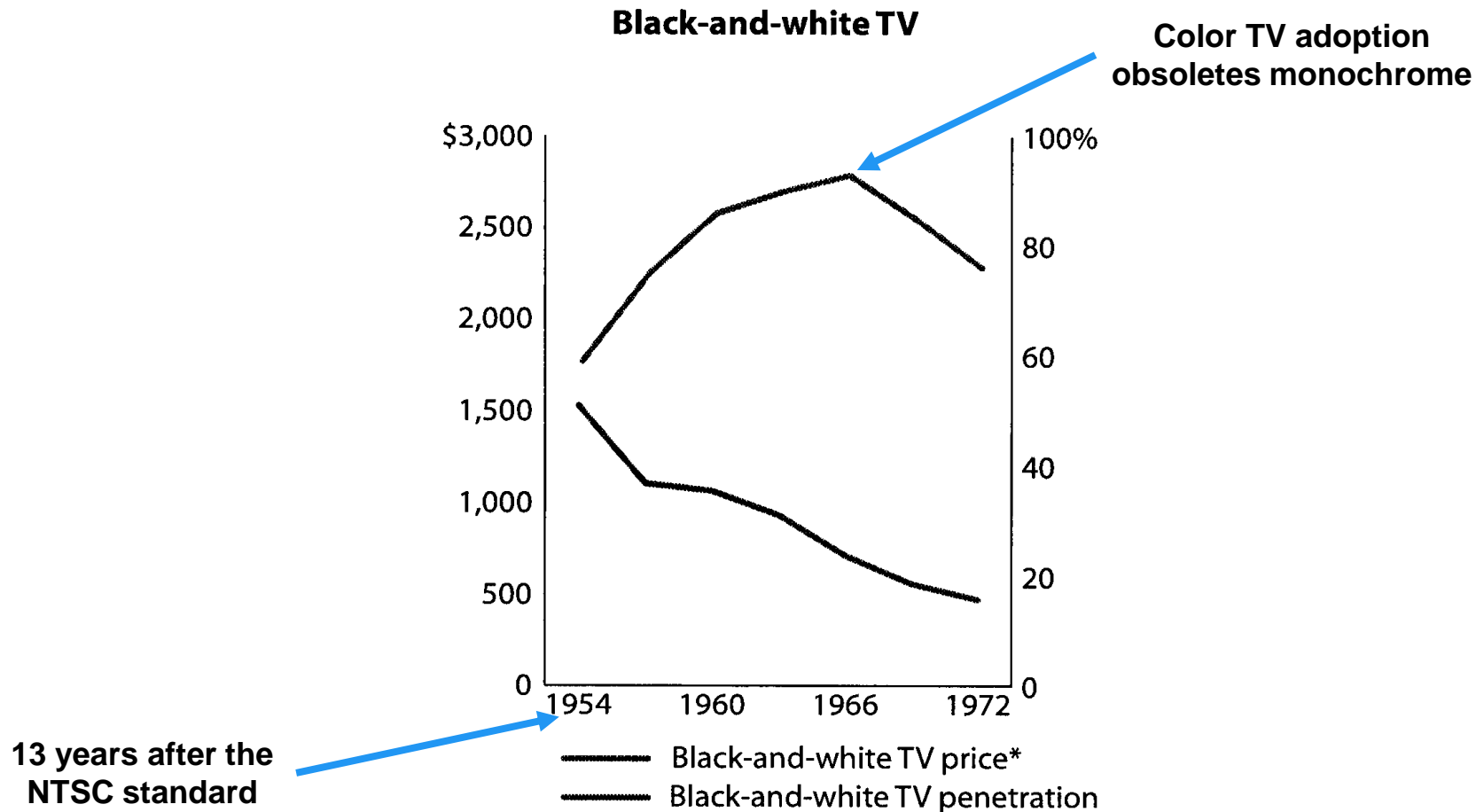
Analog Television Transmission Impairments

...transmission impairments project directly into the picture...



But the FM audio part of the signal was extremely robust

Consumer Adoption

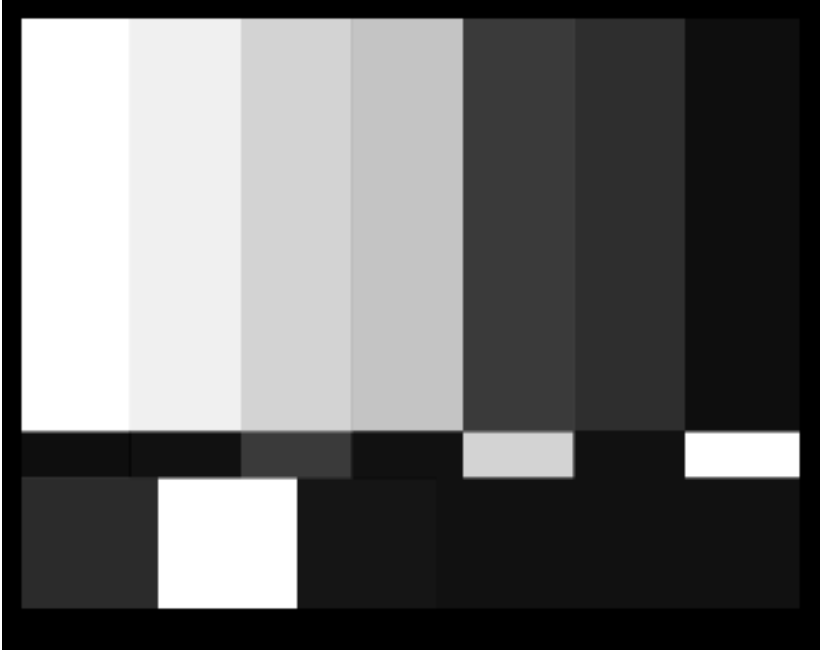


Color Television

Color Television Goals

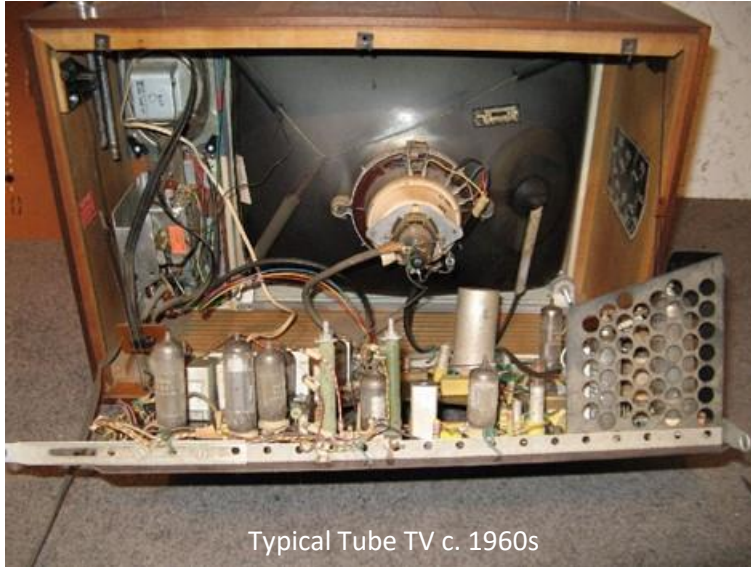
1940s – 1950s

...add color in a backward-compatible manner...



Color Television Technology Challenges

- 3x more information than monochrome TV (Red, Green and Blue)
- Fit in the same radio spectrum (6 MHz)
- Backward-compatible with monochrome TV receivers
- Multiple systems proposed



Typical Tube TV c. 1960s

Who's making the round color tube old fashioned?

Motorola is!

Don't buy a color television set that may soon be obsolete. Get a Motorola Rectangular Color TV.

Courtesy of Motorola Electronics Division, Motorola Inc., 1300 North Dearborn Street, Chicago, Illinois 60610. © 1974 Motorola Inc. All rights reserved. Motorola is a registered trademark of Motorola Inc.

MOTOROLA

new leader in the field of all electronics

New Tube

Why are folks so taken with our new tube TV sets? Well, it's rectangular — in contrast of the picture area's flat off as they are on conventional round-tube color TVs. Besides, you prefer the full-screen rectangle back to Color TV?

Just compare new Motorola ColorSet TVs.

New Slim Cabinets

The new rectangular tube is more than five inches shorter than conventional round color tubes, so slim Motorola ColorSet sets fit closer to the wall. They don't stick way out from your living room.

Many beautiful cabinet designs are available — including decorative semi-designed-by-Denon exclusively for Motorola.

Proved Dependability

Every Motorola ColorSet TV has a built-in dual channel that's hand and slip adjusted. And Motorola's full-year guarantee covers line exchange or repair of any tube or part proven defective in normal use. Arranged through selling dealer.

Labor save.

All feature R2-channel VHF-VHF tuning, have a solid state VHF tuner, a power transformer and a noise indicator light.

See the precedents-breaking ColorSet TVs. At your Motorola dealer's now.

Colors shown are approximate. Actual colors may vary slightly from those shown. Screen size varies with model.

Color TV Technology Race

1950 – CBS Color Wheel System



- Based on a mechanical, rotating color wheel

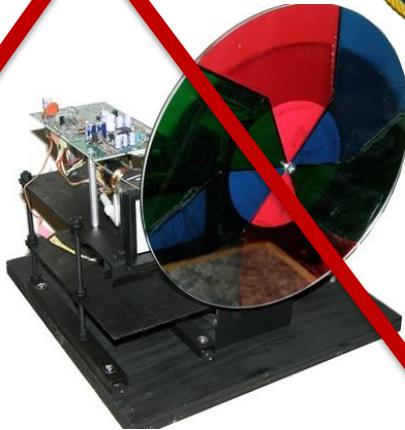


Color TV Technology Race

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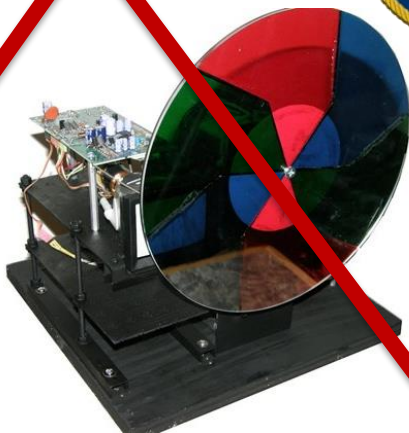


Color TV Technology Race

1950 – CBS Color Wheel System

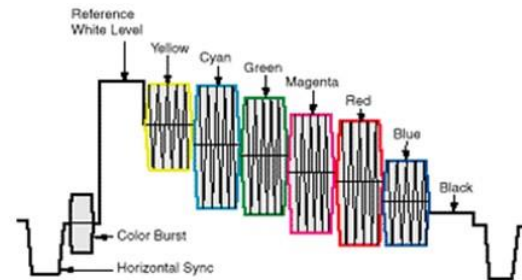


- Based on a mechanical, rotating color wheel

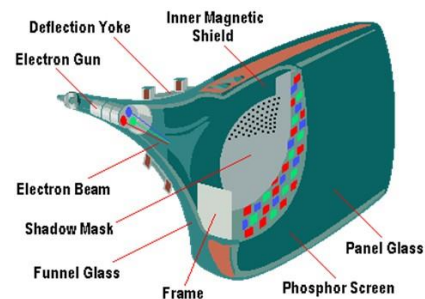


1953: NTSC Color Standard

National Television Systems Committee

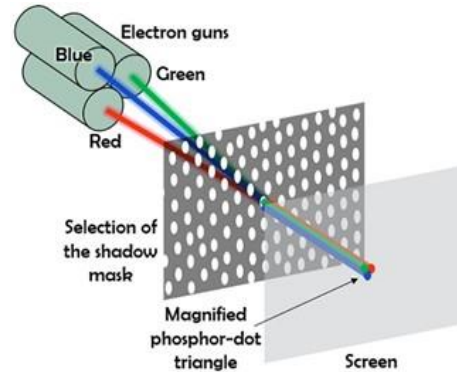
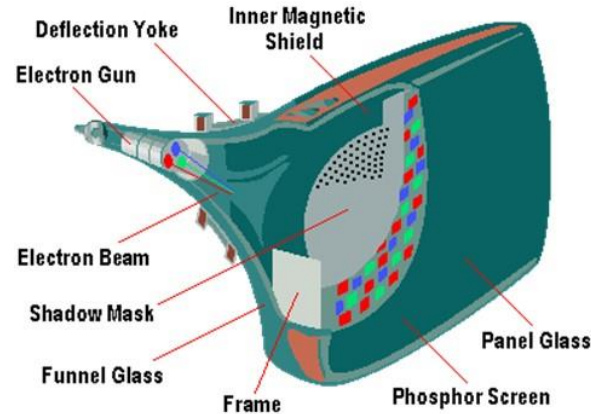


- All-electronic system
(after great debates about the details of color modulation and synchronization)

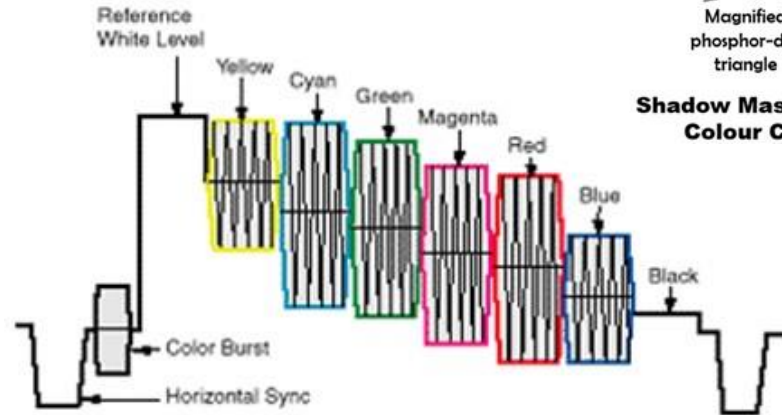


NTSC Color Innovation

- Color phosphors for CRT
- Shadow mask CRT allowed three electron guns (Red, Green and Blue)
- Compatible signal format uses principles of human vision color perception
 - Lower resolution in color
 - Most of the monochrome color comes from Green
 - $R, G, B \rightarrow Y, R-Y, B-Y$
 - Y luminance
 - R-Y and B-Y color difference signals have lower bandwidth



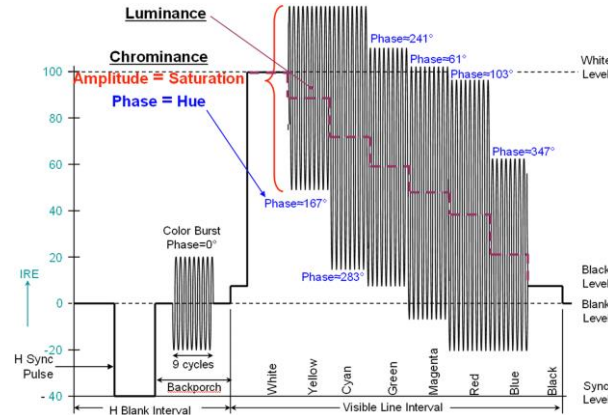
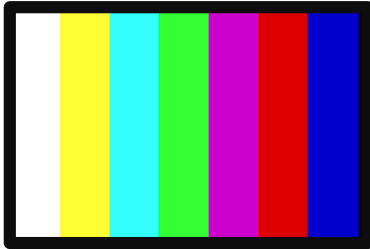
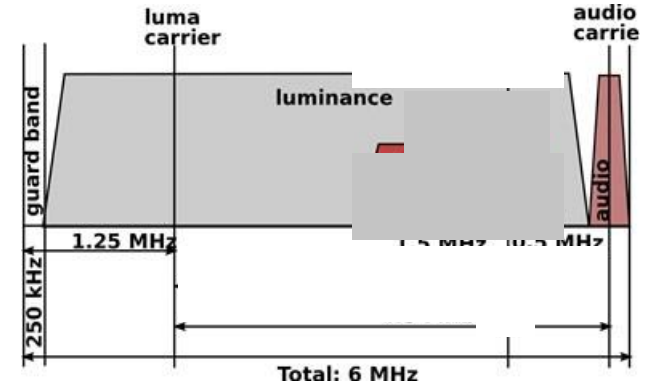
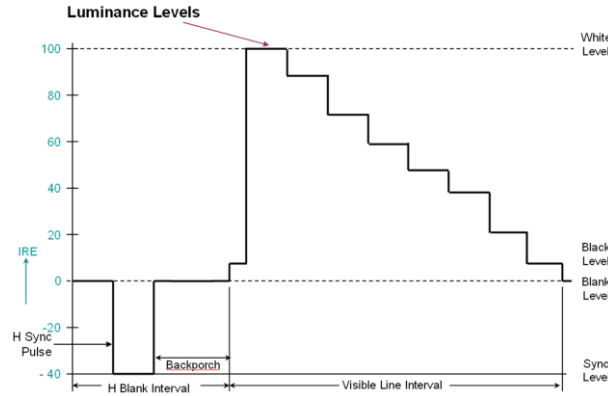
Shadow Masking in Colour CRT



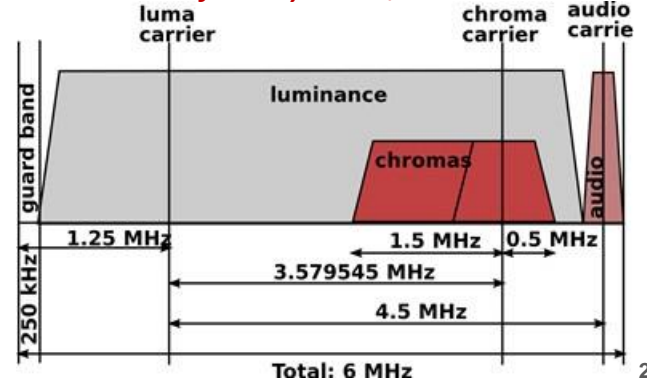
NTSC Color Television Innovation

...add color in a backward-compatible manner...

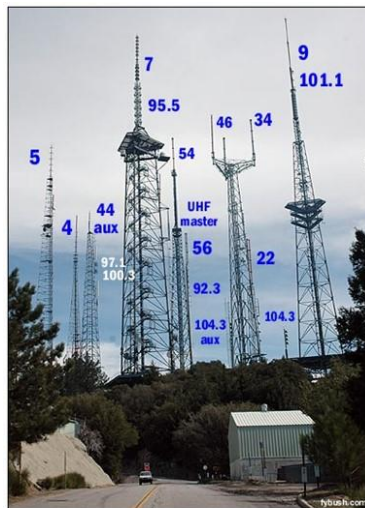
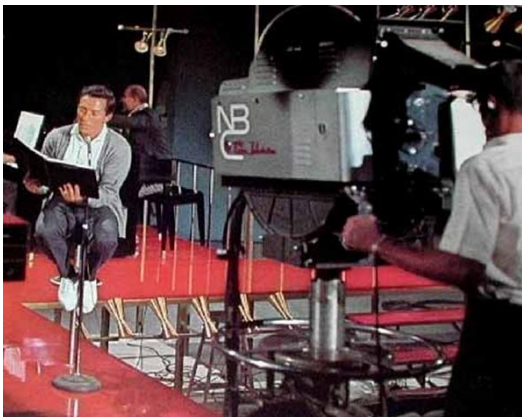
1940s – 1950s



Picture Rate shifted by 1000/1001 to 59.94 Hz



Color TV Adoption



Mount Alta, from the west



stereo sound added in 1986

Color TV Consumer Adoption

1954



=



1966



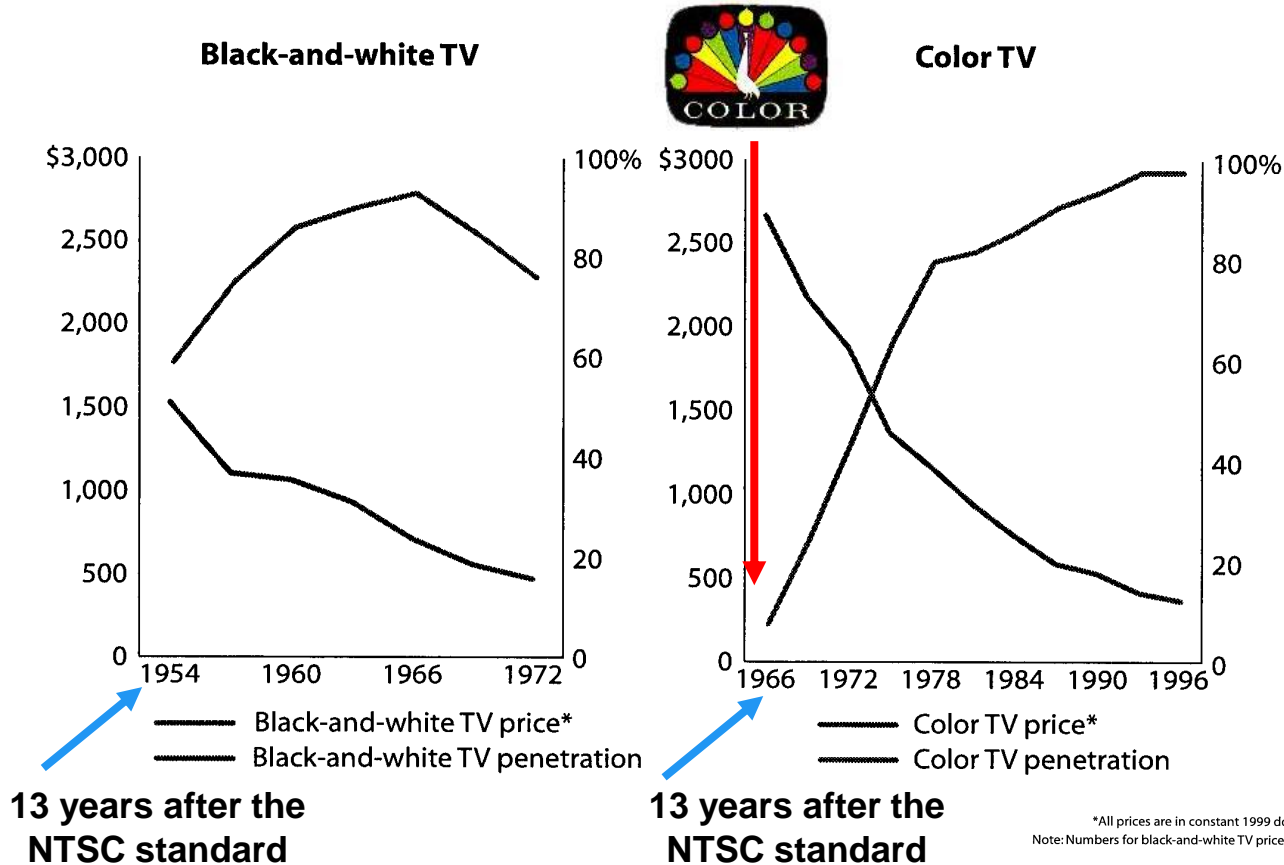
<



over \$2600 in 1999 dollars



Color TV Consumer Adoption



Color TV Impact – Subsequent Innovations

Live global broadcast via satellite (1967)

UHF



Cable TV



VCR



Camcorders

(Digital) High-Definition Television



High-Definition Television Goals

1980s – 1990s

...higher resolution, widescreen format and surround sound...

- 2x horizontal resolution and 2x vertical resolution
- Wide 16:9 aspect ratio
- Theater-quality surround sound



HDTV Technology Race

1987 – Broadcasters Petition FCC

- FCC Advisory Committee on Advanced Television Service (ACATS)
- 23 competing analog systems ...

Improved-Definition

Extended-Definition

**Two-Channel HDTV
Systems**

HDTV Technology Race

1987 – Broadcasters Petition FCC

- FCC Advisory Committee on Advanced Television Service (ACATS)
- 23 competing analog systems ...

1990 – FCC Clarifies Policy Goals

- Full HDTV
- One 6 MHz transmission channel
- No additional spectrum

~~Improved-Definition~~

~~Extended-Definition~~

~~Two-Channel HDTV
Systems~~



HDTV Technology Race

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~~Improved-Definition~~

~~Extended-Definition~~

~~Two-Channel HDTV
Systems~~



1990 – FCC Clarifies Policy Goals

- Full HDTV
- One 6 MHz transmission channel
- No additional spectrum

Four Digital System Emerge

- DigiCipher (General Instrument)
- Advanced Digital HDTV (Sarnoff, Thomson, Philips, NBC)
- Digital Spectrum-Compatible (Zenith, AT&T)
- DigiCipher Progressive (General Instrument, MIT)

HDTV Technology Race

- 1992 – System testing and demonstrations
- Jan 1993 – ACATS recommends a digital system...
- But cannot select a winner from the four digital systems



1993 Advanced Digital HDTV System

HDTV Technology Race

- May 1993 – Digital HDTV Grand Alliance formed
- April 1995 – Grand Alliance HDTV system world premiere
- Sept 1995 – ATSC Standard (Advanced Television Systems Committee)
- Dec 1996 FCC approval

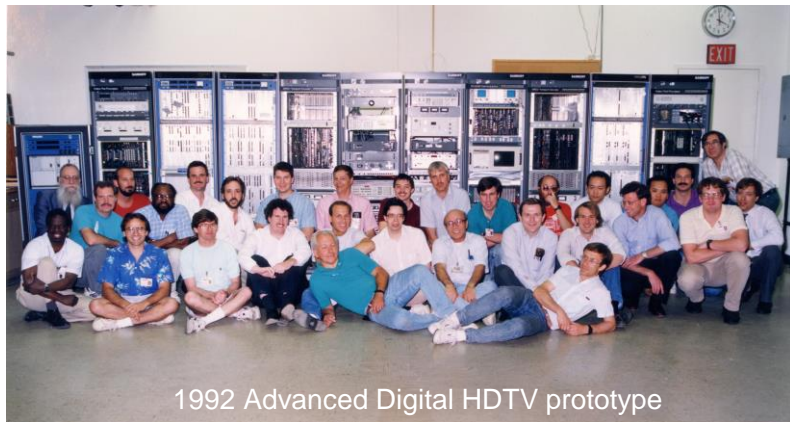


1995 Grand Alliance Demonstration to FCC

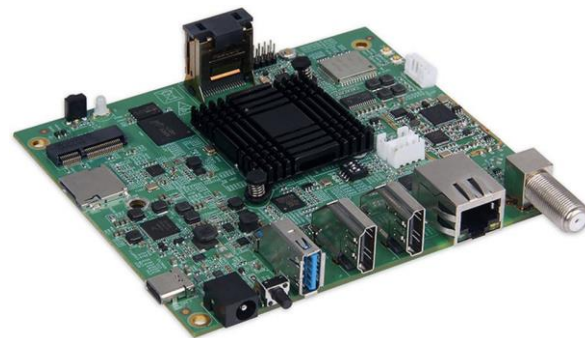
...ATSC was the world's first digital television standard...

HDTV Technology Challenges

- 5x more information than conventional TV
- Limited transmission spectrum capacity available
- HDTV transmissions must not interfere with legacy NTSC service
- HDTV transmissions must be robust to survive interference from legacy NTSC service
- Affordable receivers
- Multiple systems proposed



1992 Advanced Digital HDTV prototype



Digital HDTV Was A Revolutionary Approach

NTSC TV – 1953 analog transmission standard
CRT tube displays

Computer
DOS ... Windows 3.1



Cell Phone
Analog 2G



Dial-up
Modem
19.2 kbps



VCR - analog



Digital HDTV Was A Revolutionary Approach

NTSC TV – 1953 analog transmission standard
CRT tube displays

2M Pixels – 5x VGA
16M colors – 1,000,000x

Computer
DOS ... Windows 3.1



Wireless
Digital

Cell Phone
Analog 2G



19.4 Mbps
1000x faster

Dial-up
Modem
19.2 kbps



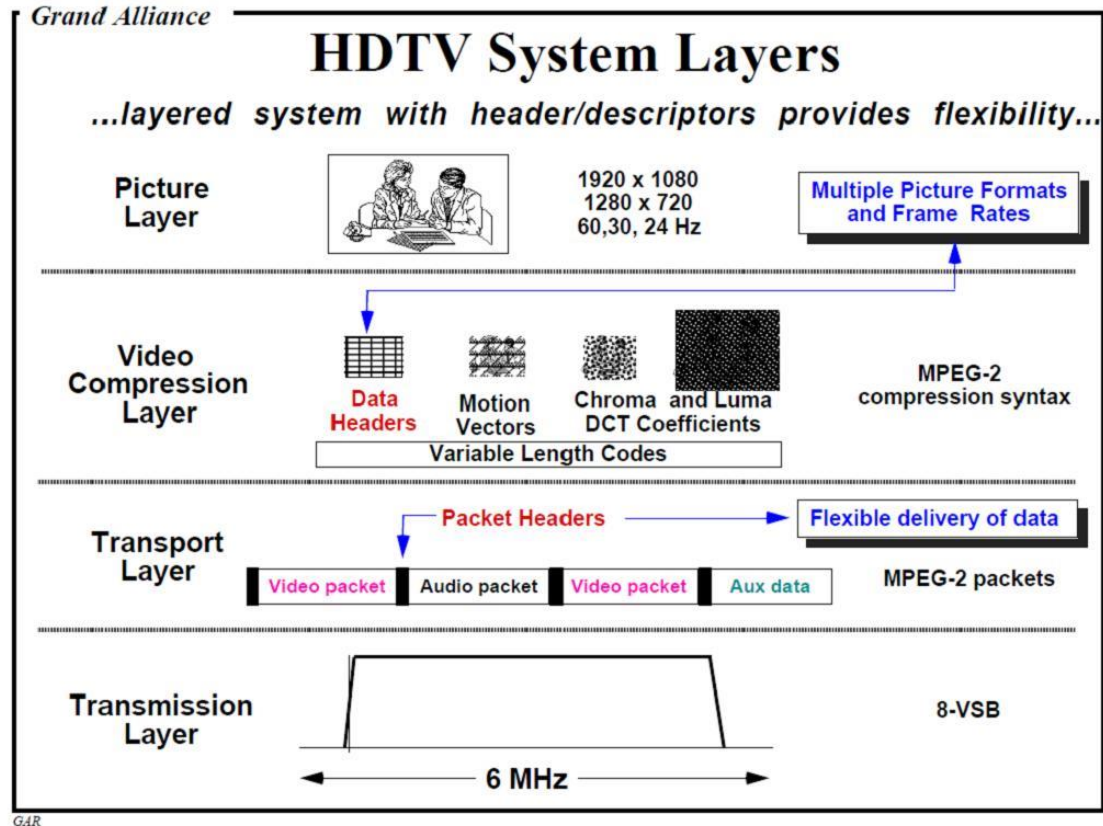
Compressed
Digital Video

VCR - analog



ATSC Digital Technology Innovations

- Multiple Picture Formats
 - HD and SD resolutions
 - Progressive and interlaced scan
 - 5.1 channel surround sound
- Digital Video and Audio Compression
- Data Packet Transport layer
 - Flexibility
 - Multiple TV streams in a channel
- 8-VSB digital modulation
 - Same coverage with 1/16th power



Digital Video Compression Challenge



Production &
Post-Production

1920 x 1080 /60



~1 Gbps

50:1 Compression

...only 2% of the original data...



Transmission

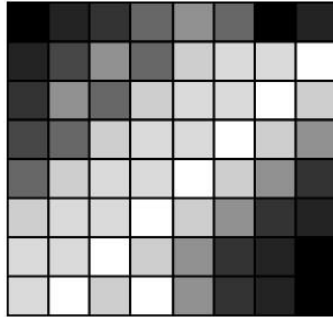


19.4 Mbps

Digital Video Compression Innovation

...blocks of pixels compressed with DCT...

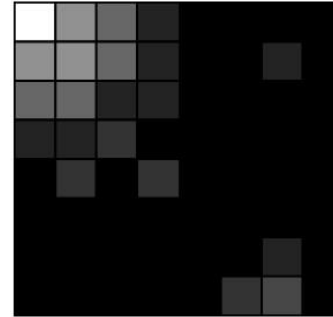
Pixel Block



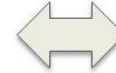
Discrete
Cosine
Transform



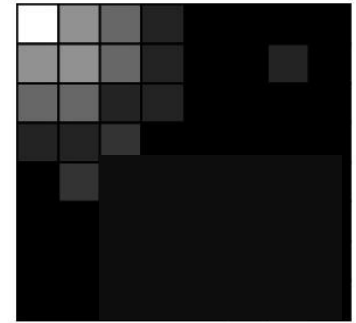
DCT Coefficients



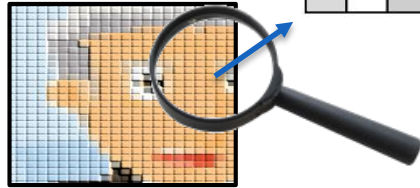
Quantization



DCT Coefficients



Discrete Cosine Transform
Coefficients (like JPEG)



$$\text{DCT}(i, j) = \frac{1}{\sqrt{2N}} C(i) C(j) \sum_{x=0}^{N-1} \sum_{y=0}^{N-1} \text{pixel}(x, y) \cos \left[\frac{(2x+1)i\pi}{2N} \right] \cos \left[\frac{(2y+1)j\pi}{2N} \right]$$

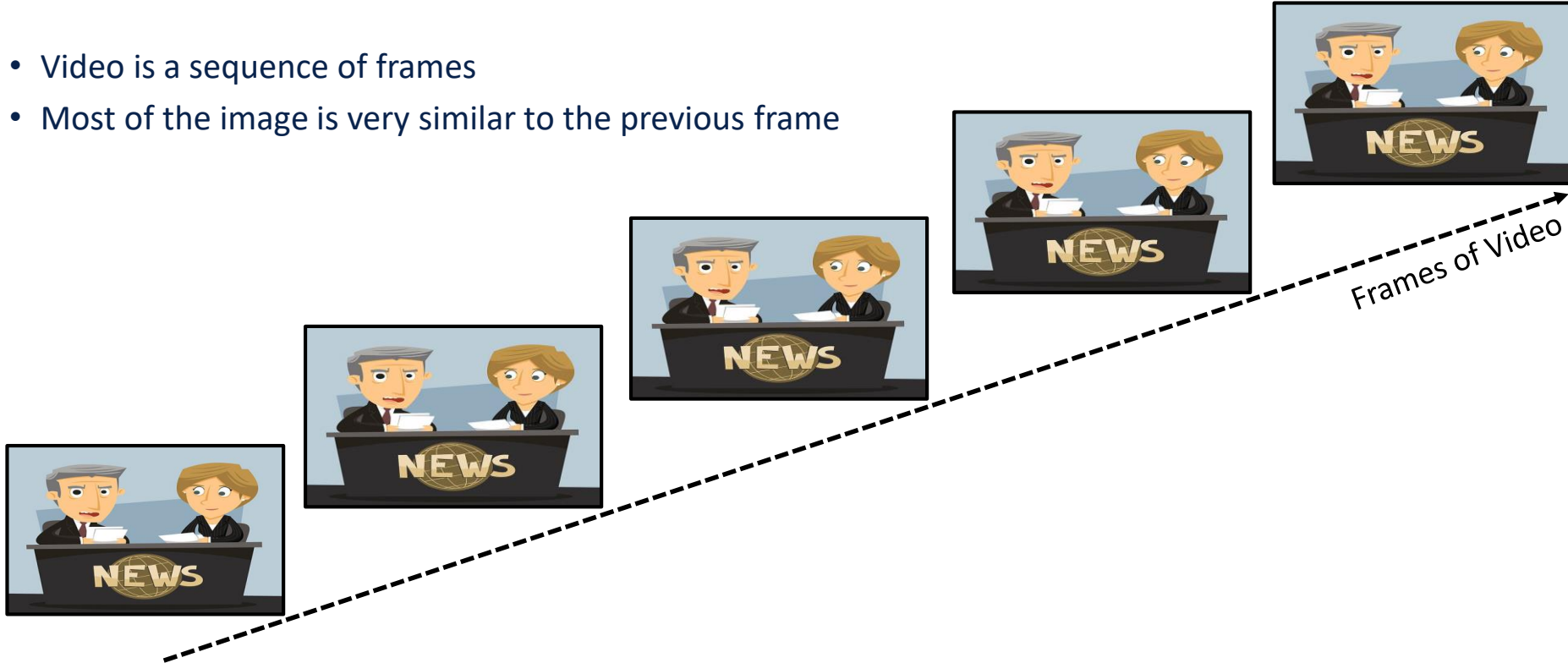
$$C(x) = \frac{1}{\sqrt{2}} \text{ if } x \text{ is 0, else } 1 \text{ if } x > 0$$

... but even more compression is needed ...

Digital Video Compression Innovation

...video is a sequence of frames...

- Video is a sequence of frames
- Most of the image is very similar to the previous frame



In analog systems, each frame is sent independently

Digital Video Compression Innovation

...send data once for many frames...

Motion Prediction

- Subdivide a frame into many blocks
- Search previous frame for best-matching block
- Encode the best predictor as a “motion vector”

Predicted Frame
(Motion vectors)



+



Fine Correction
for each pixel



+



+



Frames of Video

Correction Data

- the actual frame – the predicted frame

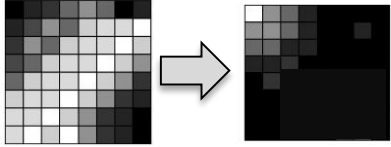
In digital systems, most frames are composed of Prediction + Correction data

Digital Video Compression Innovation

...blocks of pixels compressed with DCT...

Discrete Cosine Transform
Coefficients (like JPEG)

Pixel Block



Predicted Frame
(Motion vectors)



Fine Correction
for each pixel



Frames of Video

Discrete Cosine Transform
Coefficients (like JPEG)

Pixel Block

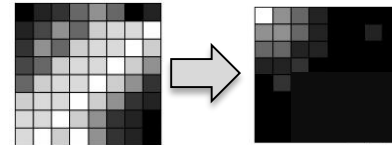
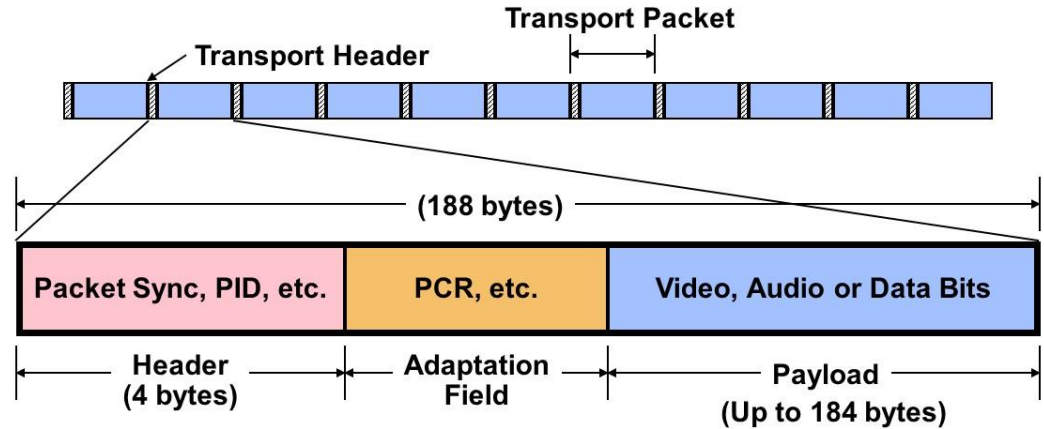


Image and predicted pixel blocks are compressed with the DCT

Data Packet Innovation

...key to broadcaster flexibility – no longer a single program in a transmission...

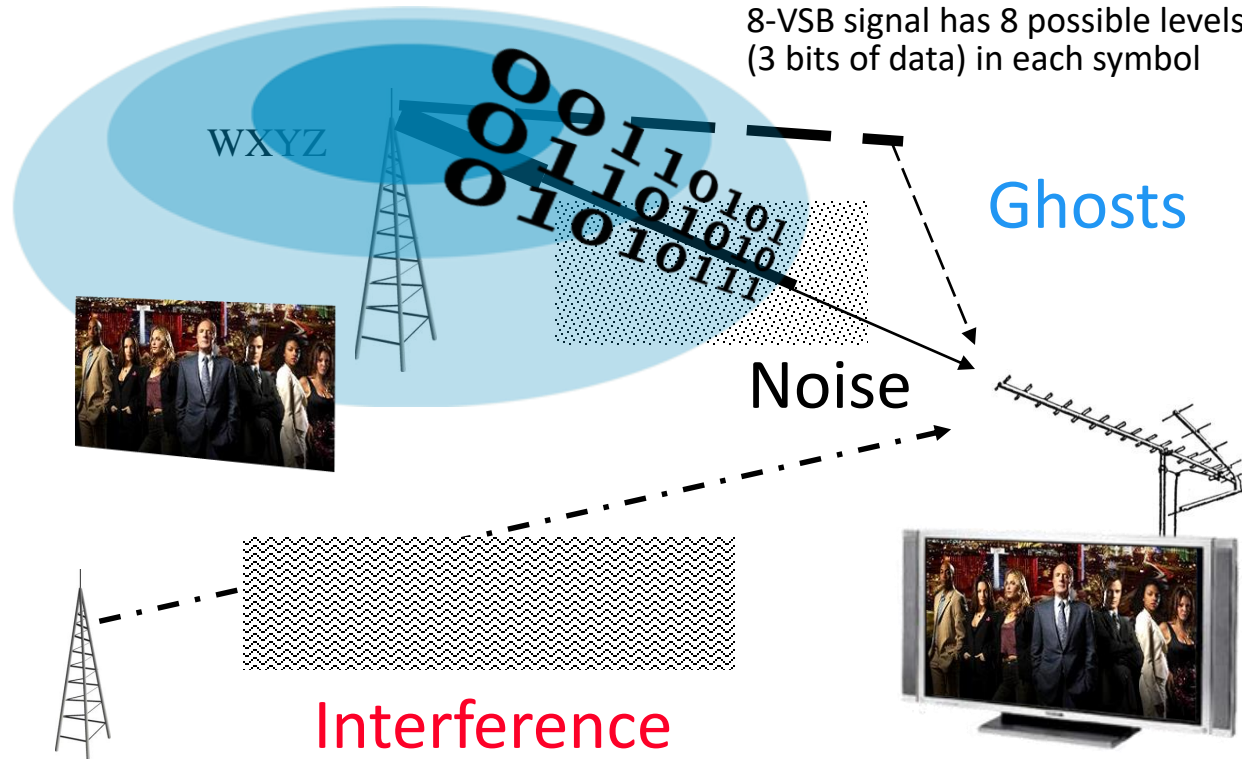
- 188 Byte fixed length packets
- Packet ID (PID) tells what type of data the packet is carrying
- PCR clock reference for receiver time synchronization
- Global standard - MPEG-2 Systems



PAT: Program Association Table repeated in PID 0
list of « services » in the TS, i.e.. TV channels or data channels
service id and PMT PID
PMT: Program Map Table
technical description of one service
list of elementary streams in the service

Digital Transmission Innovation

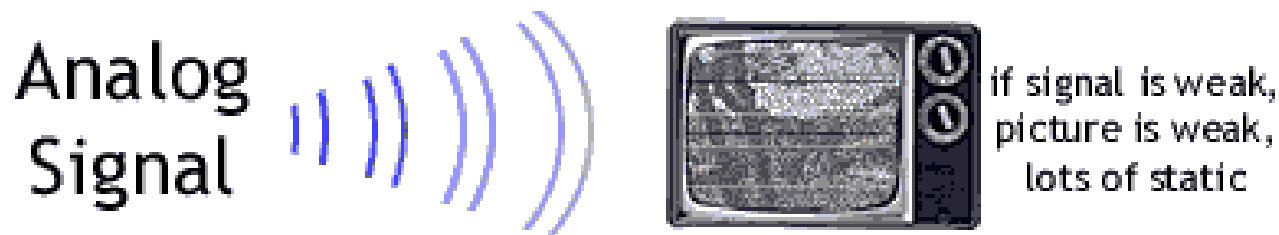
...reception is all or nothing...



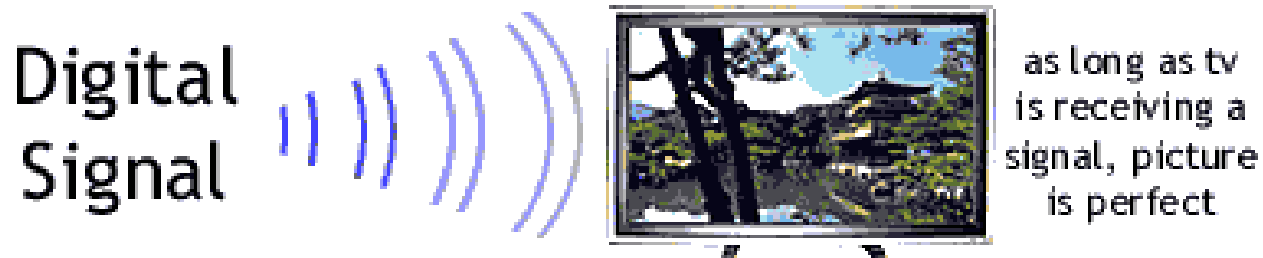
Digital HDTV Broadcast

1996: a — t — s c

Advanced Television Systems Committee



both signals weaken over distance



[25th Anniversary of the Digital HDTV Grand Alliance](#)

[Overview of Digital Television Worldwide, Proceedings of the IEEE Jan 2006](#)

[Digital HDTV Grand Alliance History](#)

FCC Transition Requirements

...simulcast in channels that are unsuitable for analog TV due to interference...



FCC – DTV Broadcaster Requirements

Top 10 Markets

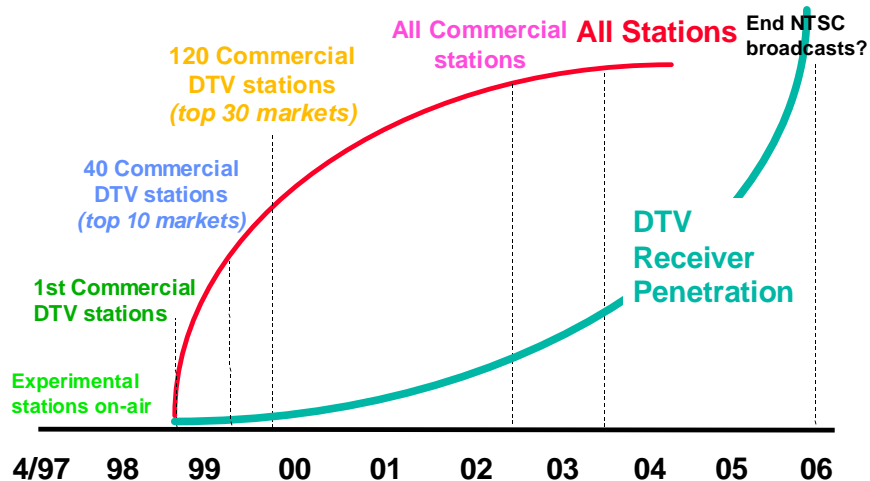
New York	Boston
Los Angeles	Washington
Chicago	Dallas/Ft Worth
Philadelphia	Detroit
San Francisco	Atlanta

30% US Households

Additional Top 30 Markets

Houston	San Diego
Seattle/Tacoma	Raleigh/Durham
Cleveland	Hartford/New Haven
Minneapolis/St. Paul	Orlando/Daytona
Miami/Ft Lauderdale	Charlotte
Phoenix	Baltimore
Tampa/St Petersburg	Portland
Denver	Cincinnati
Pittsburg	Indianapolis
St. Louis	Sacramento/Stockton

50% US Households



FCC – DTV Tuner Requirements

July 1, 2004 – 50% of large screen sets (36" and higher)

July 1, 2005 – all large sets and 50% of mid-size sets (25 – 36")

March 1, 2006 – all mid size sets

March 1, 2007 – all new TV sets and other TV receivers

HDTV Consumer Adoption

1998

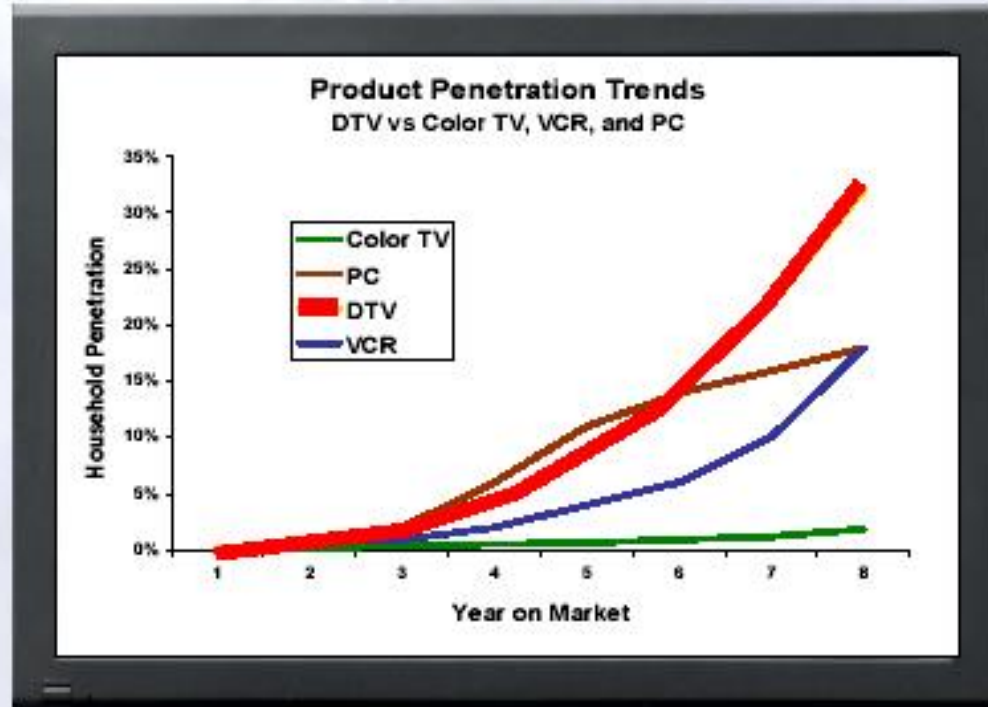
under \$9,000



HIGH DEFINITION TELEVISION
HDTV
MONITOR

DTV In Perspective

The DTV adoption rate surpasses that of the PC, the VCR and the Color TV.



- Government “Converter Box” coupon program
- June 2009 - Analog Broadcasts end

Next... H.266

HEVC H.265

**Video
Steaming**

**Cable
Modems**

**Cloud
DVR**

VOD

DVR

AVC H.264

DBS

**Digital
Cable**

DVD

Blu-ray

**Video
Downloads**

**Digital
Cinema**

MPEG-2

a t s c

Digital HDTV

Grand Alliance

DVB

**Flat-Panel
Displays**

ATSC Impact

Next-Gen Television



The “Modern” Digital World of the 21st Century

... Rapid Advances and Ongoing Disruptions ...

Cable & DSL Modem

Up to 100 Mbps

WiFi 802.11ac 1300 Mbps



1999: 802.11b (11 Mbps)

2009: 802.11n (600 Mbps)

2013: 802.11ac (1300 Mbps)



Computer



HDTV Digital – Smart TVs

4k LED & OLED displays



Tablets



2010: iPad (16 Gbytes)

2014: iPad Air 2 (128 Gbytes)



Wearables



4G Networks

12 Mbps

5G Networks

Coming Soon...



SmartPhones



2007: iPhone (4Gbytes)

2014: iPhone 6 (128 Gbytes)

ATSC 3.0 Goals

- Modern “App” experience – personalization and interactivity
- Ultra High Definition (4k) resolution with High Dynamic Range
- Immersive Audio
- IP-based for interoperability with modern digital devices
- New flexibilities in data transmission capacity vs. robustness
 - Options for greatly improved indoor reception
 - On-channel repeaters (SFN)
 - Options for mobile/automotive reception
- Targeted advertising insertion
- Affordable receivers



ATSC 3.0 Effort
Began in 2012



FCC Approved
in 2017

ATSC 3.0 Technology Challenges

- Leveraging modern internet technologies and standards
- 4x more information in Ultra High Definition (4k) resolution
- 25% more information in High Dynamic Range video (10-bit vs. 8-bit)
- 4x more information in Immersive Audio (22.2 channel vs. 5.1 channel)
- Transmissions must be robust to survive interference from on-channel repeaters
- Mobile reception capabilities
- No additional spectrum
- No temporary spectrum
- Affordable receivers
- ~~Multiple systems proposed~~ Collaborative industry process

Broadcaster “App”

ATSC 1.0



- Pictures, Graphics and Sound are “burned in”
- Same experience for entire audience

The TV Screen is a Web Page

ATSC 3.0



- HTML5/Internet screen composition / graphics
- Hybrid delivery - merge broadcast & internet
- Dynamic Ad Insertion
- Personalized Graphics
- Interactivity
- Synchronized second-screen applications
- Personalized Audio - user control of tracks and mix
- Audience Measurement capabilities – audio watermark triggers

Picture and Sound

ATSC 1.0



Standard Dynamic Range and Color
100-nit color grading, Rec. 709 color, 8 bits/pixel

- Allows HDTV & 1-2 SD multicast
- Dolby Digital (AC-3) 5.1 surround sound

Better Pictures & Sound
and/or More Services

ATSC 3.0



High Dynamic Range and Wide Color Gamut
1000-nit color grading, Rec. 2020 color, 10 bits/pixel

- >300% more capacity with HEVC video compression
- UltraHD and/or HD and/or SD multicast
 - 1 Ultra HD ... 4 HD ... flexible mix of HD and SD
 - High Dynamic Range
- Dolby AC-4 (ATMOS) Audio (Personalized ... Immersive)

Ultra High Definition (4k) Means Sharper Pictures



High Dynamic Range (HDR) and Wide Color Gamut (WCG)



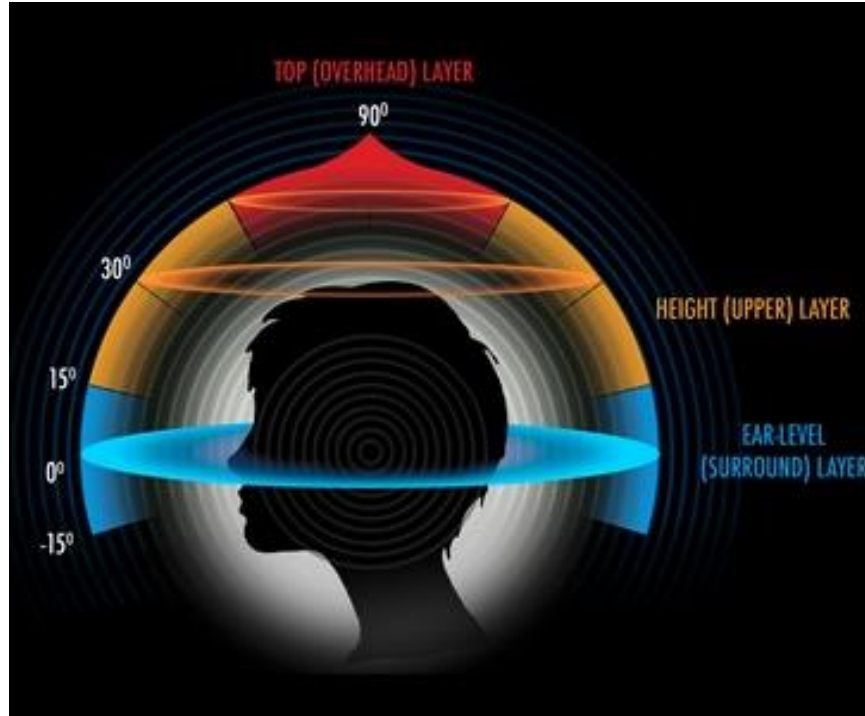
Standard Dynamic Range



High Dynamic Range

Immersive Audio and Personalized Audio

...channels and/or objects from any location in space...



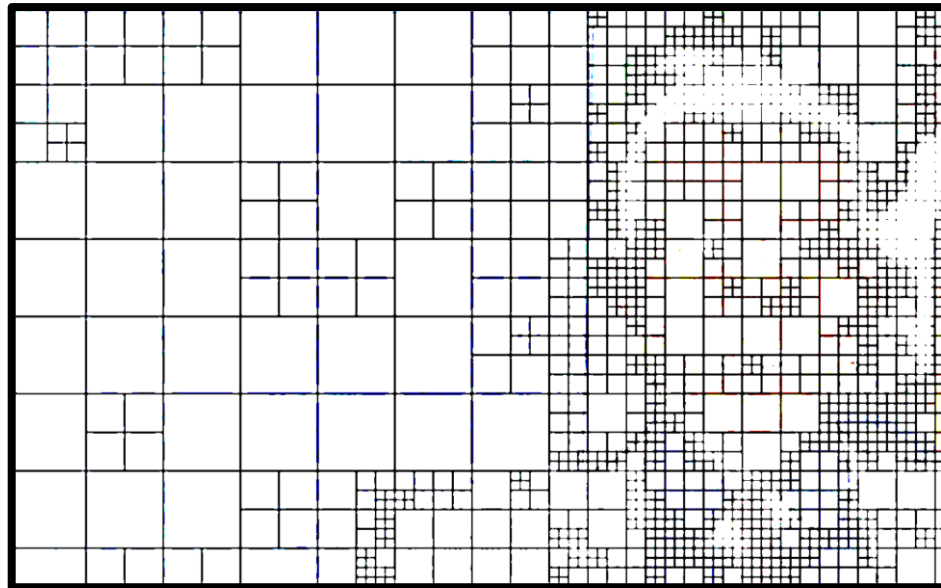
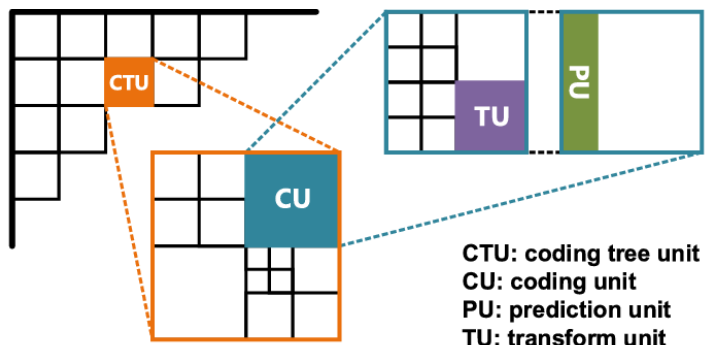
- Rendered for the speaker environment by the device



...listeners can personalize their experience ... different announcers for a sporting event

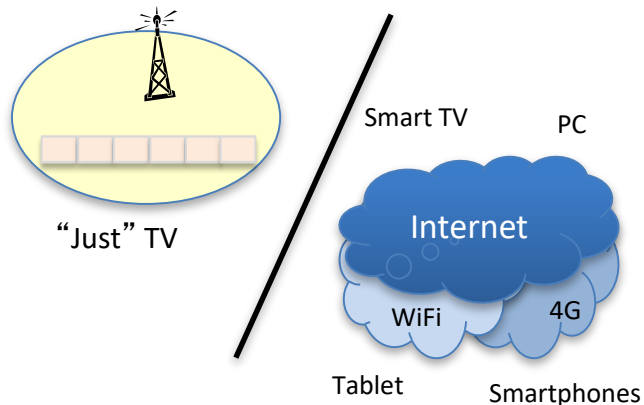
ATSC 3.0 High Efficiency Video Compression Innovation

- Variable size “Prediction Units”
 - better and more efficient motion prediction
- Multiple Block sizes and structures
 - Coding Tree Units up to 64x64 with flexibly subdivided Coding Units
 - Coding Units have separate Prediction Units and Transform Units



IP Data Format Innovation

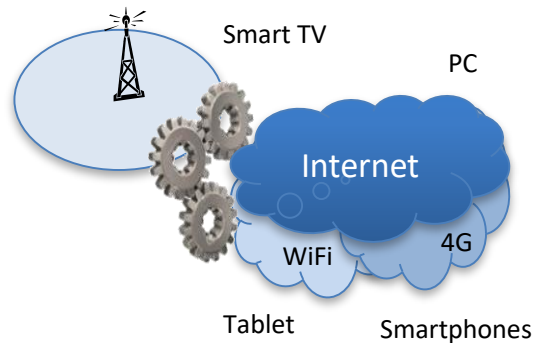
ATSC 1.0



- MPEG-2 Transport Stream provides service flexibility for multicasting
- But Broadcasting isn't part of the internet
- No simple way for broadcast content to reach new IP-connected consumer devices

Broadcasting Becomes Part of the Internet

ATSC 3.0

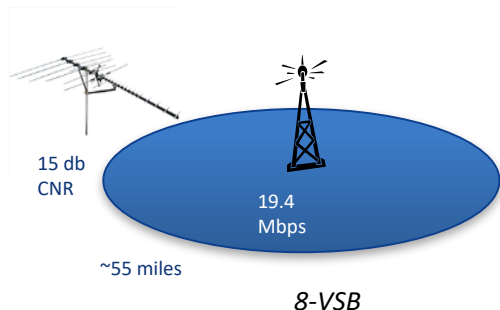


- Uses Internet Protocol - enable broadcasting to become PART OF the wireless internet
- Enables personalized and interactive content and targeted ads
- Easily retransmitted throughout home on WiFi
- With an ATSC 3.0 tuner, Broadcast IP streams complement 4G and WiFi
- **3.0 is a broadcast AND broadband standard**

Over-The-Air Transmission Innovation

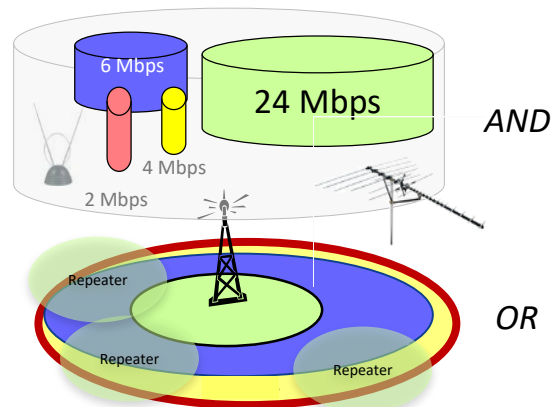
More Bits To More Places

ATSC 1.0



- One bit rate – 19.39 Mbps
- One coverage area (rooftop antenna)
- Service flexibility – HDTV, multicast, data

ATSC 3.0

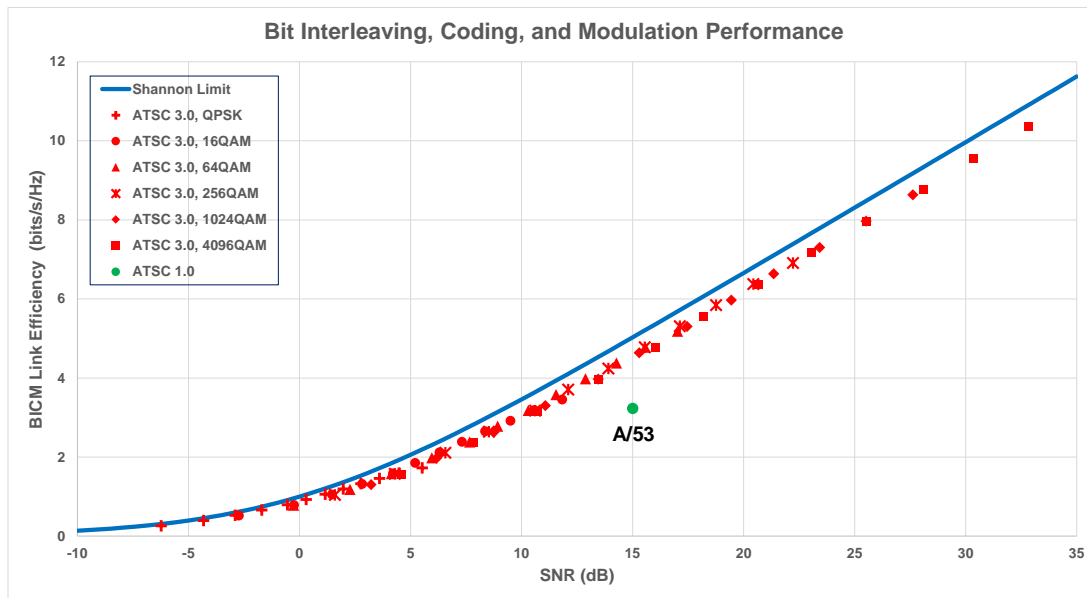
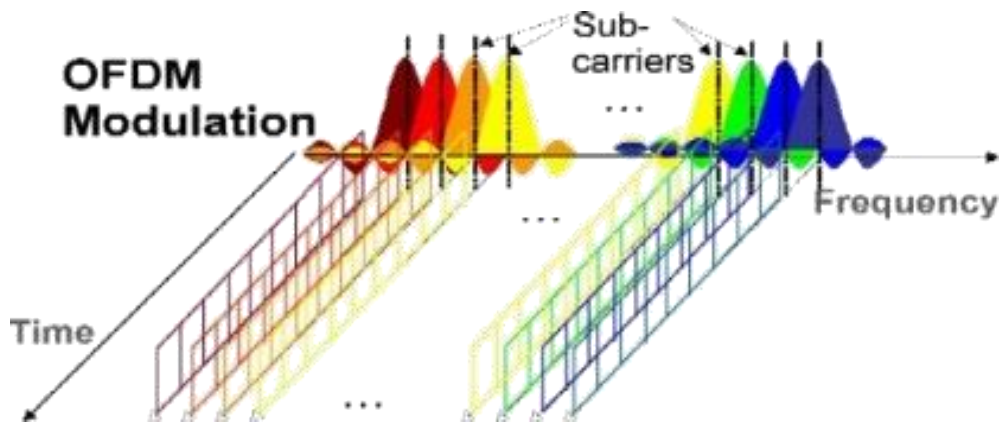


More Capacity, Greater Reach, New Services

- >20% more bits for the same coverage area
- Flexible bit rate & coverage area choices
 - More bits / less coverage ... or
 - Fewer bits / more robust reception ... or
 - Flexible mix in different parts of the signal
- Optional on-channel repeaters for robust indoor & mobile reception over entire DMA

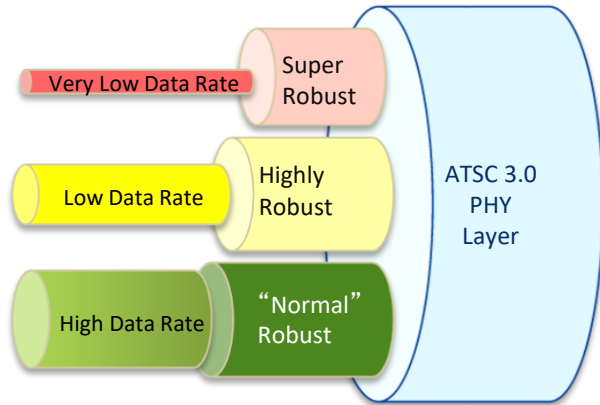
OFDM Modulation

- ATSC 3.0 transmission uses OFDM (Orthogonal Frequency Division Multiplex) with 8k, 16k or 32k carriers
- A variable Guard Interval enables OFDM to operate with strong on-channel repeaters, which constructively add to signal strength
- Carriers can use QPSK, 16 QAM, 64 QAM, 256 QAM or 1026 QAM – providing a flexible choice of data rate / CNR noise threshold

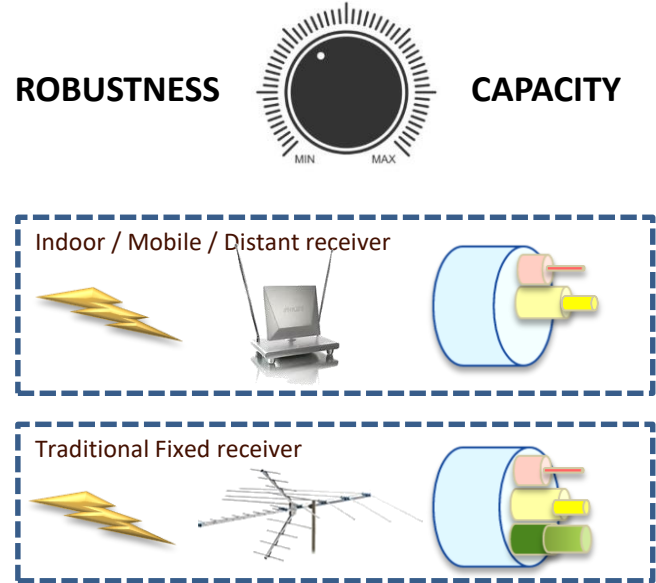


Physical Layer Pipes

- Physical Layer Pipe (PLP) is a set of OFDM carriers with the same modulation parameters
- ATSC 3.0 signal can be configured with up to 4 PLP “virtual channels”



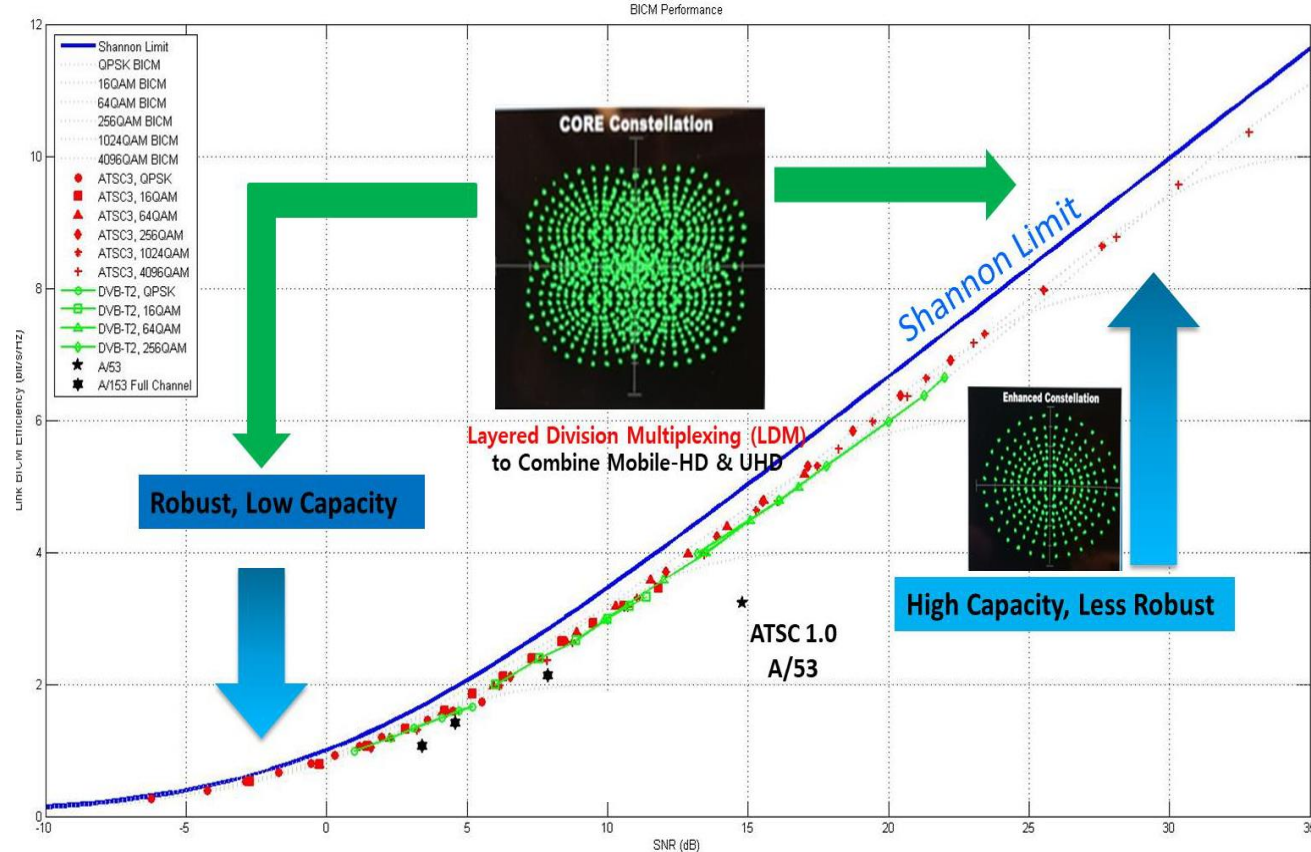
- Broadcasters can deliver different services at different bit rates and robustness levels within the same transmission



Signal can be configured for Various Services, Considering Geography, Terrain and Receivability Factors

Layer Division Multiplex

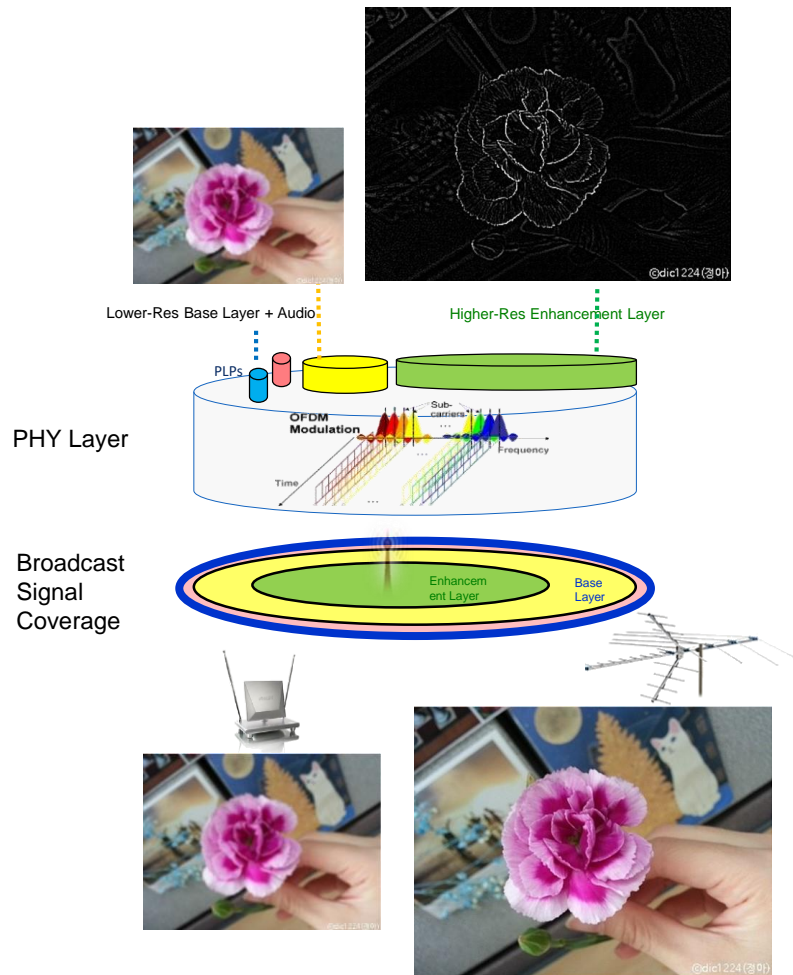
- Layer Division Multiplexing (LDM) superimposes two OFDM signals at different power levels
- The more robust signal is detected and subtracted out to obtain the less robust signal



Layered Service Configurations

- SHVC “Spatial Scalability” compression
 - Lower-Resolution Base Layer (e.g., Standard-Def)
 - Higher-Resolution Enhancement Layer (e.g., High-Def)
- Requires less capacity than simply simulcasting multiple resolutions

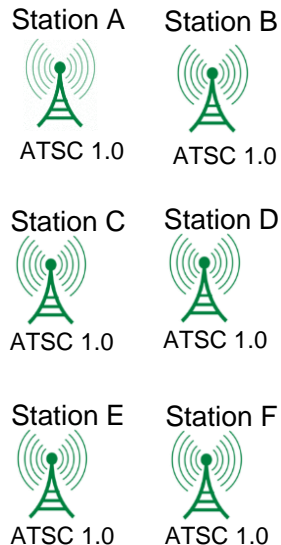
Robust indoor / portable and mobile reception
are new capabilities for Broadcasters



ATSC 3.0 Transition Plan – Voluntary Industry Transition

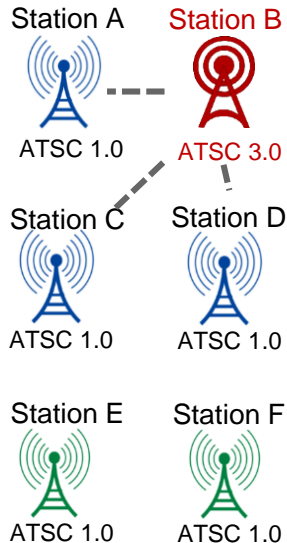
...create simulcast capacity for a transition by sharing channels...

Today



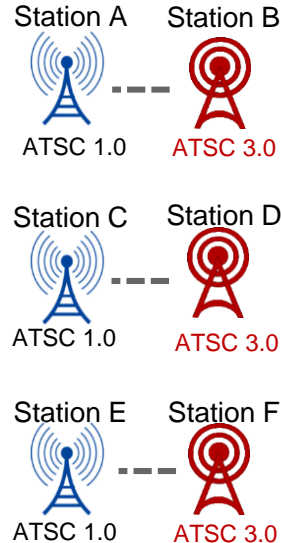
Phase I - Launch

One ATSC 3.0 is a “Beacon”



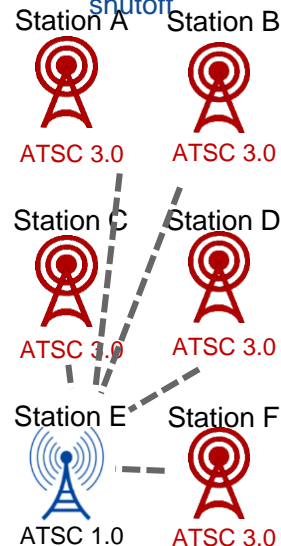
Phase II - Mid-Term

Simulcast 3.0 and 1.0



Phase III - Late

3.0 is prevalent
Last 1.0 is “lifeline” until final shutoff

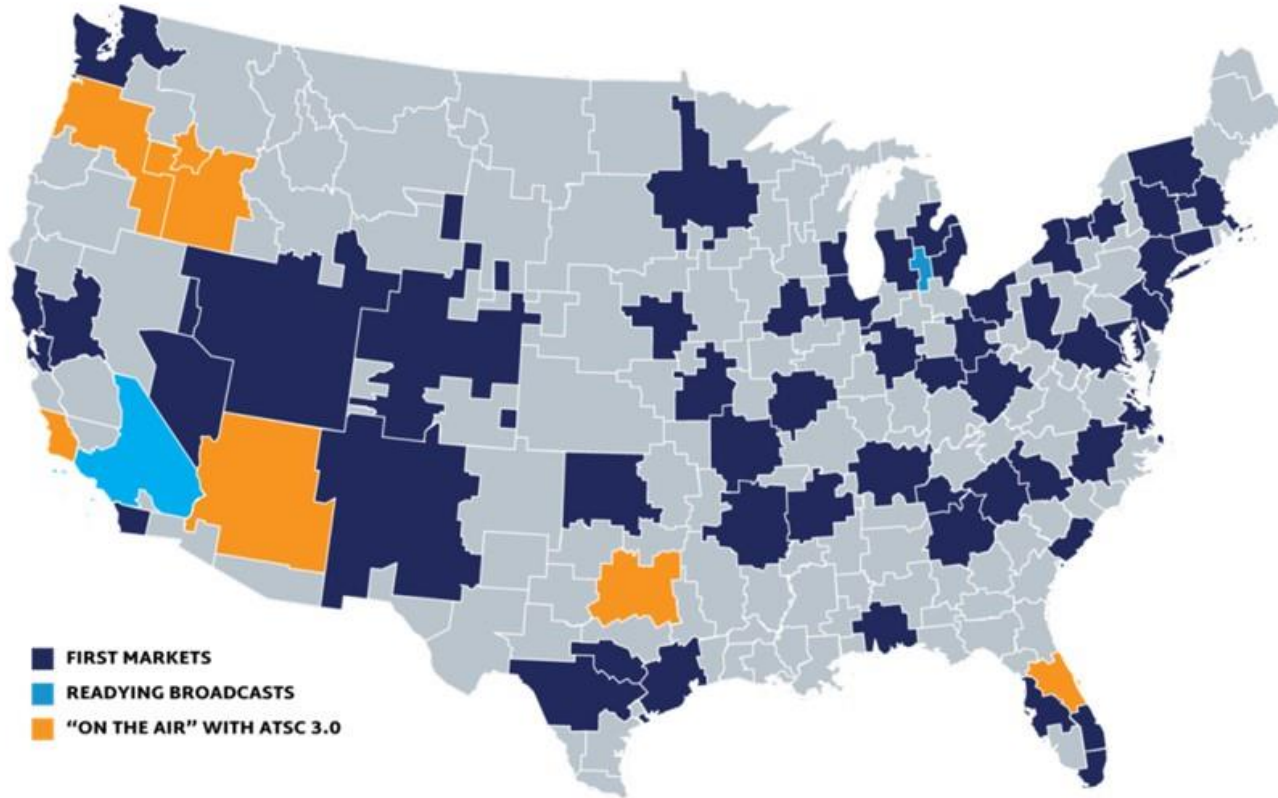


- ATSC 1.0 channel can be shared to create new capacity (at reduced quality)
- ATSC 3.0 channel can be shared as a “lighthouse”

NextGen TV Launch Status

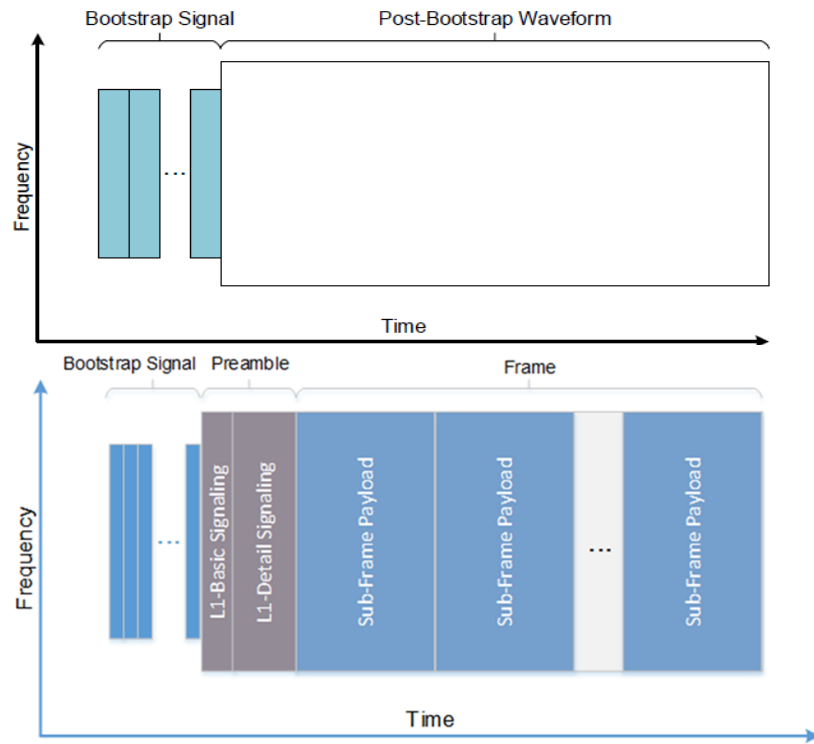
Nov. 2020

...60 television stations in 16 markets...



Bootstrap Signal

- Bootstrap for signal discovery and control signaling
 - extremely robust
 - synchronization symbol at start of each data frame
 - Indicates number of symbols in a variable-size time-slice of RF waveform
 - Data frames subdivided into subframes
 - daisy-chains across data frames
- 3.0 standard currently defines OFDM modulation
- Enables future use of currently undefined waveforms for in-place evolution of the RF channel



Future Predictions

NextGenTV ... 20 Models Launching in 2020



ATSC 3.0

NEXT GENERATION IP-BASED
TV BROADCASTING IS **HERE!**

U.S. broadcasters are now rolling out ATSC 3.0, an IP-based service built for Ultra HDTV, immersive audio and more

The advertisement features a dark blue background with a glowing ATSC 3.0 logo. Below the logo, the text 'NEXT GENERATION IP-BASED TV BROADCASTING IS HERE!' is displayed in white. At the bottom, a horizontal strip shows three images: a hand holding a remote control, a '4K' logo, and a person wearing headphones and using a tablet.



80%

say they are either "interested" or "very interested" in purchasing a Next Generation TV or accessory

How interested would you be in purchasing a Next Generation TV or accessory?
Scale: 1=Very interested, 3=Not at all interested

The slide shows a woman standing next to a large screen displaying a survey interface. The screen has a '2 BACK TWO' header and a list of items with checkboxes. The background is a solid pink color.



MOST CONSUMERS SAY THEY ARE WILLING TO PAY \$100-\$300 MORE FOR A NEW TV

They adjust the price they are willing to spend **based on level of access to features.**

The TV 3.0 is appealing because it **has the ability to offer all of the features** and seems like a **good investment.**

The slide features a white background with a pink decorative element on the right side that resembles a globe made of flowers. The text is in a clean, sans-serif font.

Receiver Implementations Already Compact

at CES 2020

Set-top Box



TV Tuner



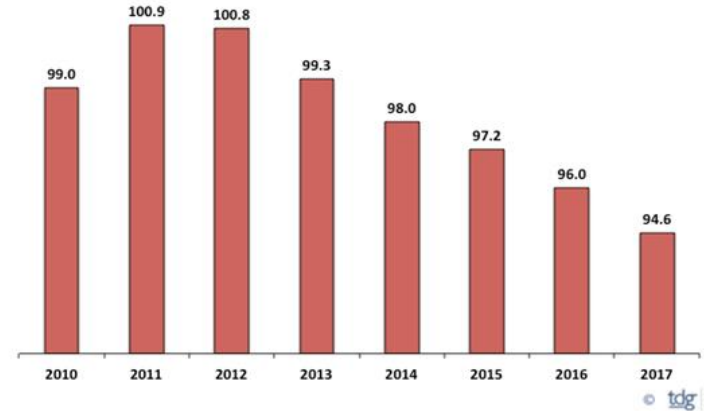
ATSC 3.0 Module



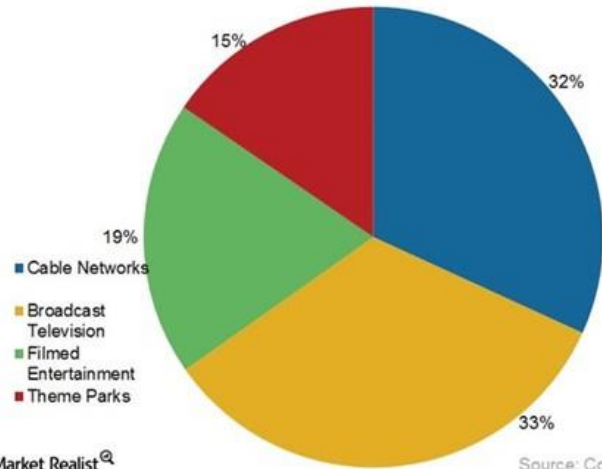
Broadcasting is Alive and Well

- Pay TV households are shrinking
- Over 17M antenna-only households and growing
- Another 4-5M antenna TVs in pay-TV homes
- OTT + OTA is a growing combination
- Broadcast Networks reach virtually all households – highest reach for national advertisers

US Pay-TV Households, 2010-2017
(millions of US households)



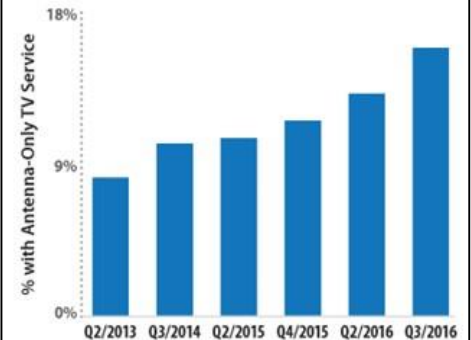
Revenue Distribution of Comcast's NBCUniversal Business in Fiscal 3Q16



Market Realist

Source: Comcast SEC Filings

Antenna-Only TV Service (2013-2016)
U.S. Broadband Households



© Parks Associates

New Product Innovations – TV Gateways

- TV Home Gateway Concept
- WiFi Hub that can receive over-the-air (OTA) NextGen TV signals and redistribute to any smart device in the home via WiFi
- Facilitates OTA + OTT combination



NextGen TV is a Platform



Wrap Up

TV Standards – 80 Years of Progress

1941 Monochrome TV

NTSC

Added sight to sound

1953 Color TV

**NTSC
Color**

3x the picture information - compatibly

1987 Color TV Stereo Sound

2x the sound information - compatibly

1996



*Digital transmission, multiple programs
5x the picture info, 3x the sound info,
in channels unsuitable for analog TV*

2020



*Flexible digital transmission
5x the picture info, 4x the sound info,
Multiple Services for different devices
Modern App-based user experience*

More Information

- History of monochrome TV development
 - *The Great Television Race: A History of the American Television Industry, 1925-1941* (Udelson)
- History of color TV development
 - *And Part of Which I Was: Recollections of a Research Engineer* (Brown)
- History of digital HDTV development
 - *Defining Vision* (Brinkley)
 - *High Definition Television: The Creation, Development and Implementation of HDTV Technology* (Cianci)
 - <https://www.glennreitmeier.tv/grand-alliance-hdtv-home>
- Technical papers
 - Overview of Digital Television Worldwide, Proceedings of the IEEE, Jan 2006
 - Video Compression and Its Role in the History of Television, SMPTE Journal Aug 2016 (Reitmeier, Sullivan)
 - ATSC 3.0 Standards Usher in Next Gen TV Era, SMPTE Journal, July 2019 (Noland)
- Society of Motion Picture and Television Engineers virtual course
 - Understanding ATSC 3.0 - NextGen TV and the Future of Broadcasting (Reitmeier, Cugnini, Siegler)
<https://www.smpte.org/virtual-course/understanding-atsc-30-nextgen-tv-and-future-broadcasting>

Thank You

Questions?