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A PRESENTATION BY

LAURA MARTIN

THE VIEW FROM WALL STREET: WHO WILL SURVIVE IN BIG TECH'S NEW COMPETITIVE LANDSCAPE?

The effects of competition from Facebook, Apple, Amazon, Netflix, and Google (FAANG) on traditional, old economy businesses has been the subject of much debate and analysis. But that's yesterday's news, Laura Martin argues. The next wave of competition is among the FAANGs themselves, and not all of them will survive.

In a new report, Martin explains that FAANG companies succeeded so dramatically because they benefit from network effects (where a new user adds value to other users), while 95 percent of other firms in the S&P 500 do not. Now, FAANG companies are competing with each other, creating a new competitive landscape that we have only just begun to understand.

Join us to discuss the implications of this new competition on areas including data privacy, 5G, consumer choice, and the future of media.

Hear Laura Martin and decide for yourself which of the FAANGs will survive.



Laura Martin, CFA and CMT, is a senior analyst at Needham and Co. She publishes research on the largest internet and entertainment companies. She also serves on TPI's Board of Directors.



LOGISTICS:

When: March 5, 2019

Time: 12:00-1:30

Where: The City Club of
Washington, 555 13th St.,
NW, Washington, DC

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