

Session 6 Trends in Broadcasting and Mobile Television

Peter Walop, ITU expert

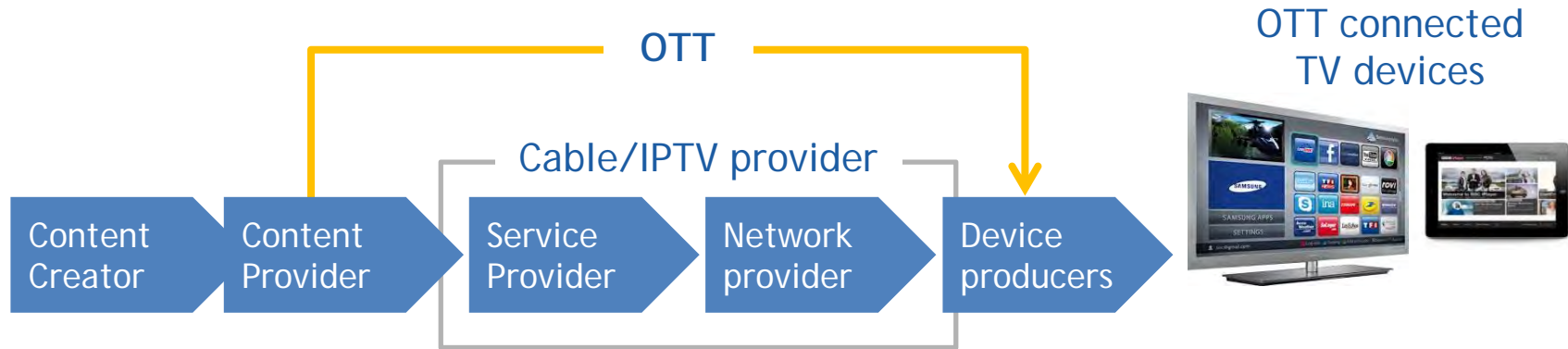


Presentation Overview

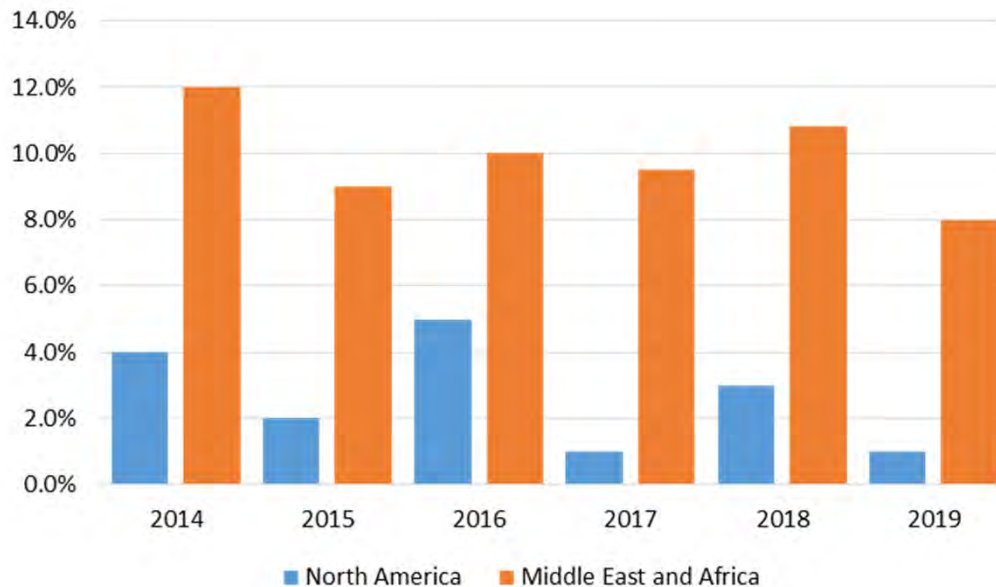
- TV still going strong?
- Drivers
- Race for capacity



1. TV still going strong?



TV ADEX Annual Growth Rates (%)

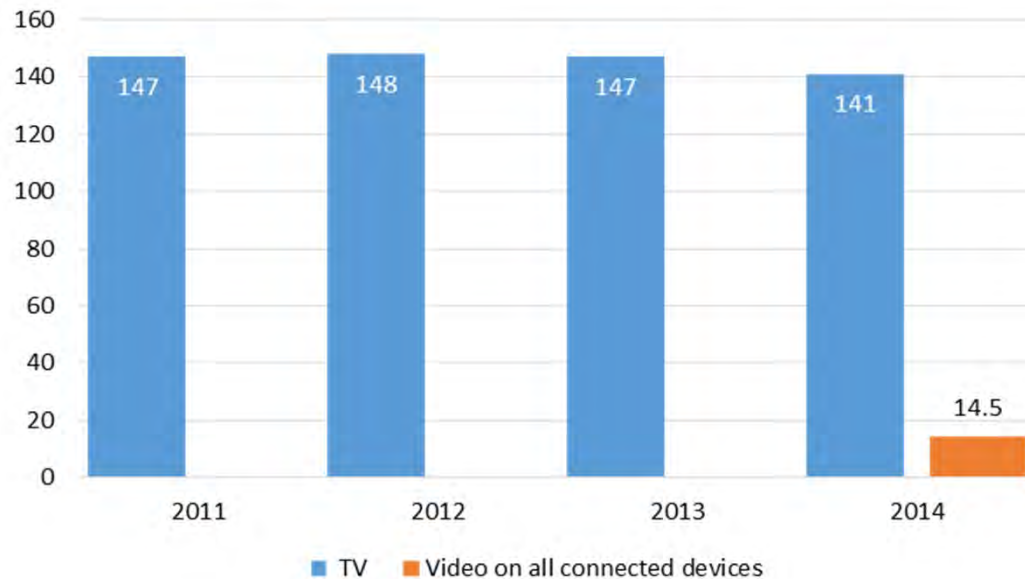


Source: PwC Global Media Outlook

- TV still going strong? It depends..
 - OTT claims shares in 'cabled' countries
 - OTT needs good broadband, especially for (U)HDTV

1. TV still going strong?

Monthly viewing time - US (hours/month)

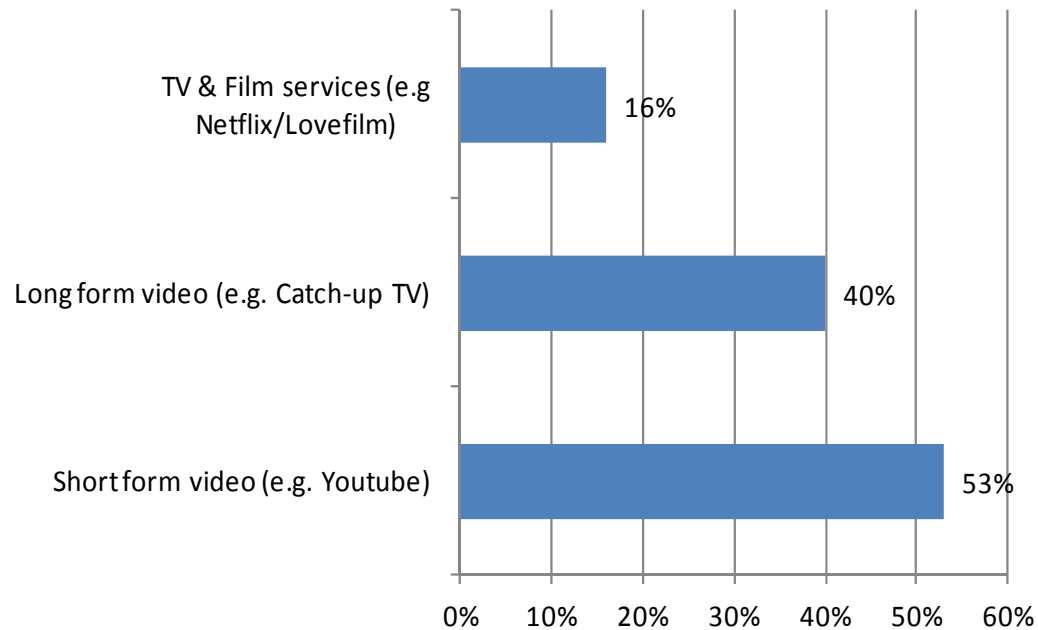


Source: Nielsen US

- 'OTT homeland' US shows viewership impact
- From 2013 to 2014:
 - OTT subscribers from 35% to 40% of TVHH
 - Time shifting from 13hr12 to 14hr20 per month

1. TV still going strong?

Type of VOD consumed (%)



Source: Ofcom

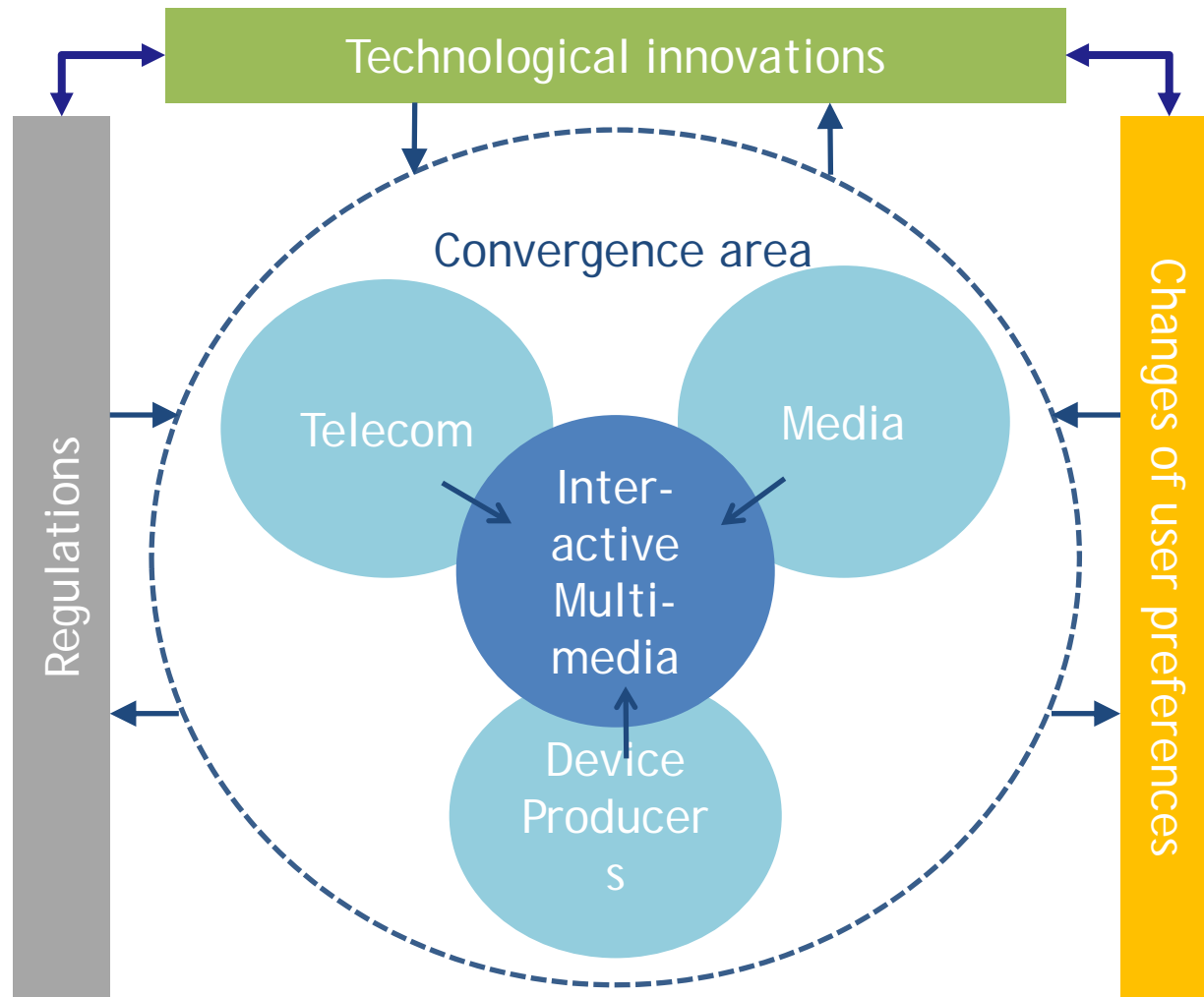
- Most of VOD is 'catch-up-TV' of mainstream TV services
- Premium content and brand management is key
- About half is short form video and is on the move/mobile

Presentation Overview

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2. Drivers

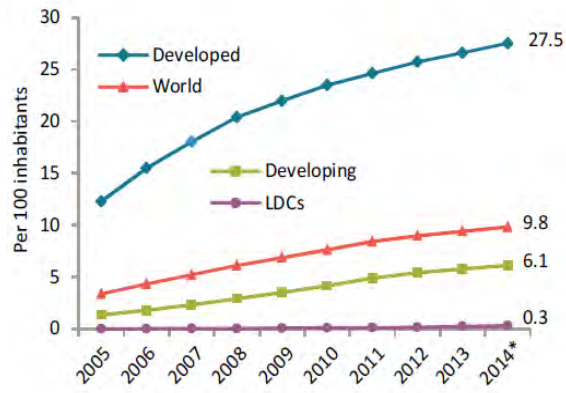


Source: Convergence Consulting Company

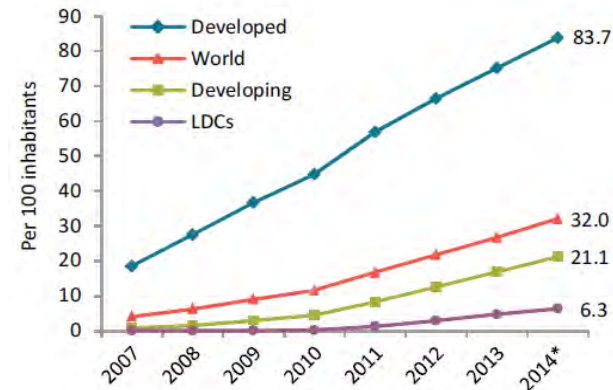
2. Drivers

More Broadband Access (>256 Kbps)

Active Fixed Subscribers

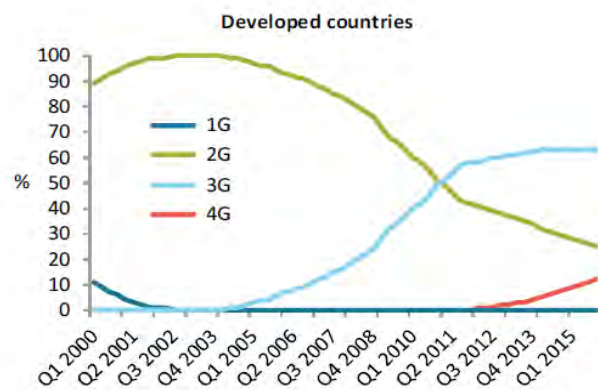


Active Mobile Subscribers



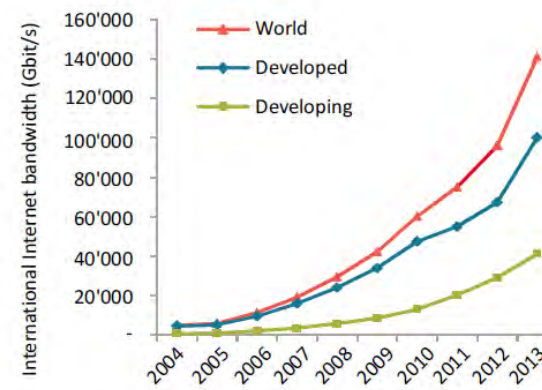
More Smart Devices

Mobile Subs by technology (%)



More Bandwidth

International Internet BW (Gbps)

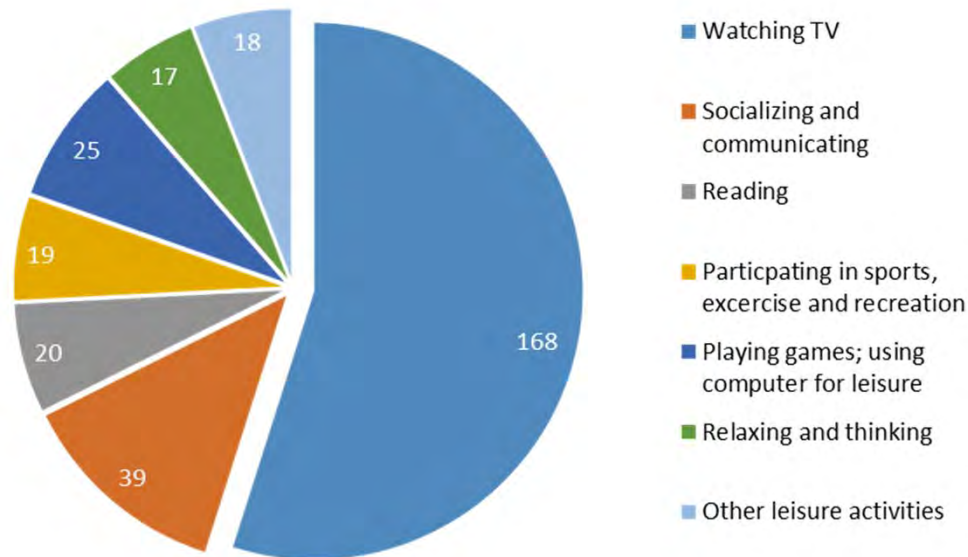


Source: ITU

2. Drivers

Changes of user preferences

Leisure time spent on average day (minutes)



Source: American Time Use Survey

- For every additional free hour, 30 minutes goes into watching television
- All UK TV viewing = all time spent on all social networks worldwide (6.5 billion hours)
- Leisure and technology intertwined in several ways
- Change is slow and yes we get more leisure time.. Really!

2. Drivers

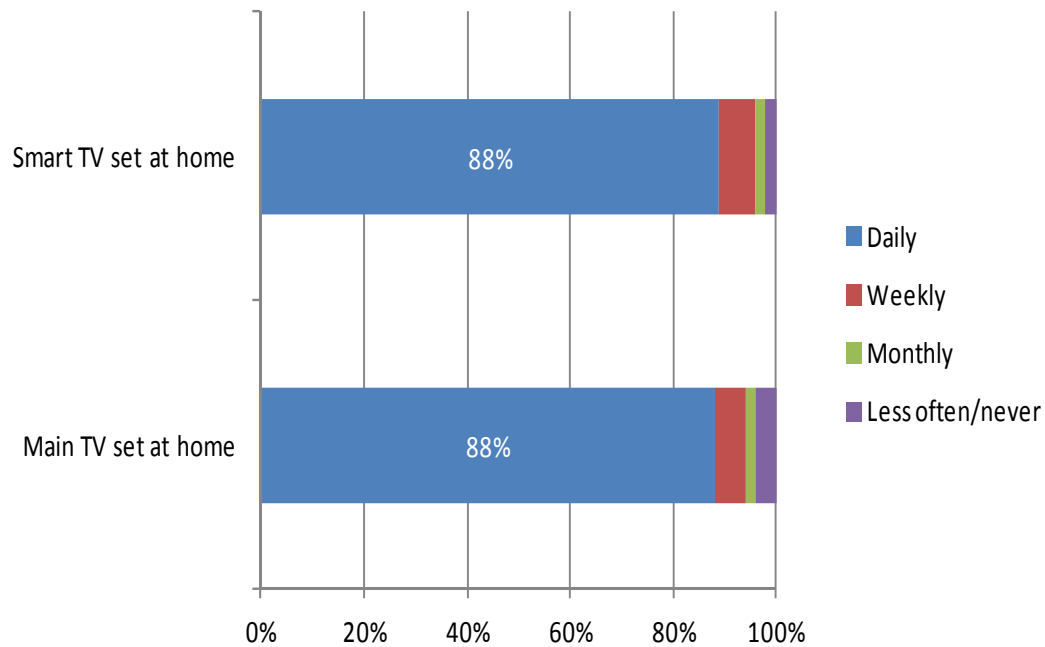
“ My labourers work 11 hours a day and preferably not in the evenings or Sundays ”

Steam engine factory, end 19th century

2. Drivers

Changes of user preferences

Frequency of Watching Linear TV



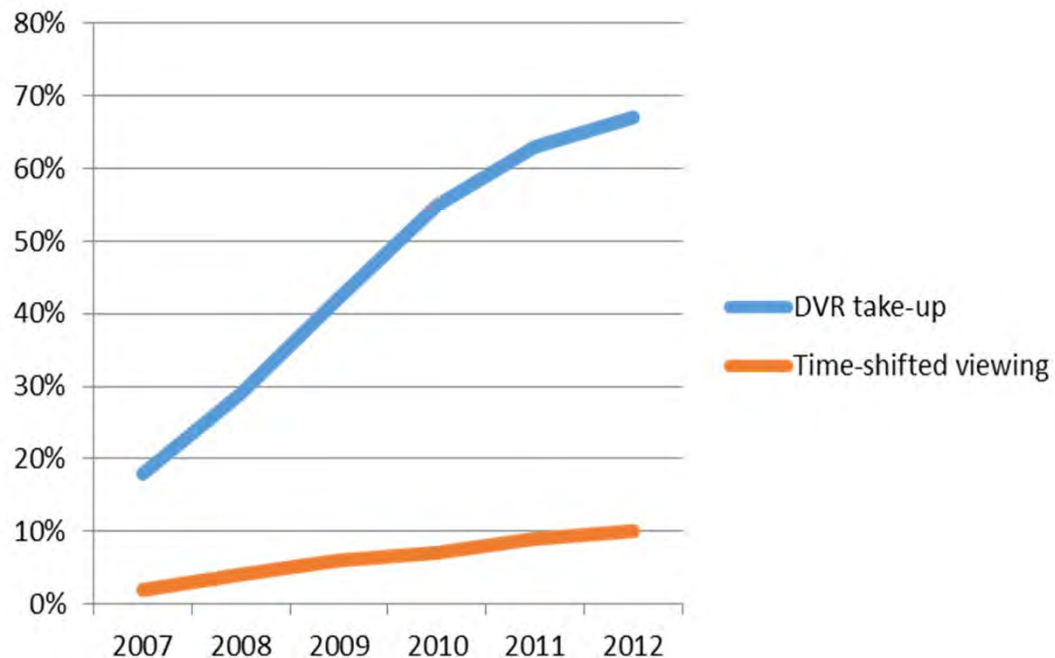
Source: Ofcom

- User preferences are lagging behind technology
- Most cited reasons for using VOD services is to catch-up TV broadcasts
- Connected sets on the rise and standardization of apps will result in more VOD

2. Drivers

Changes of user preferences

Number of DVRs and Time Shifting



Source: BARB

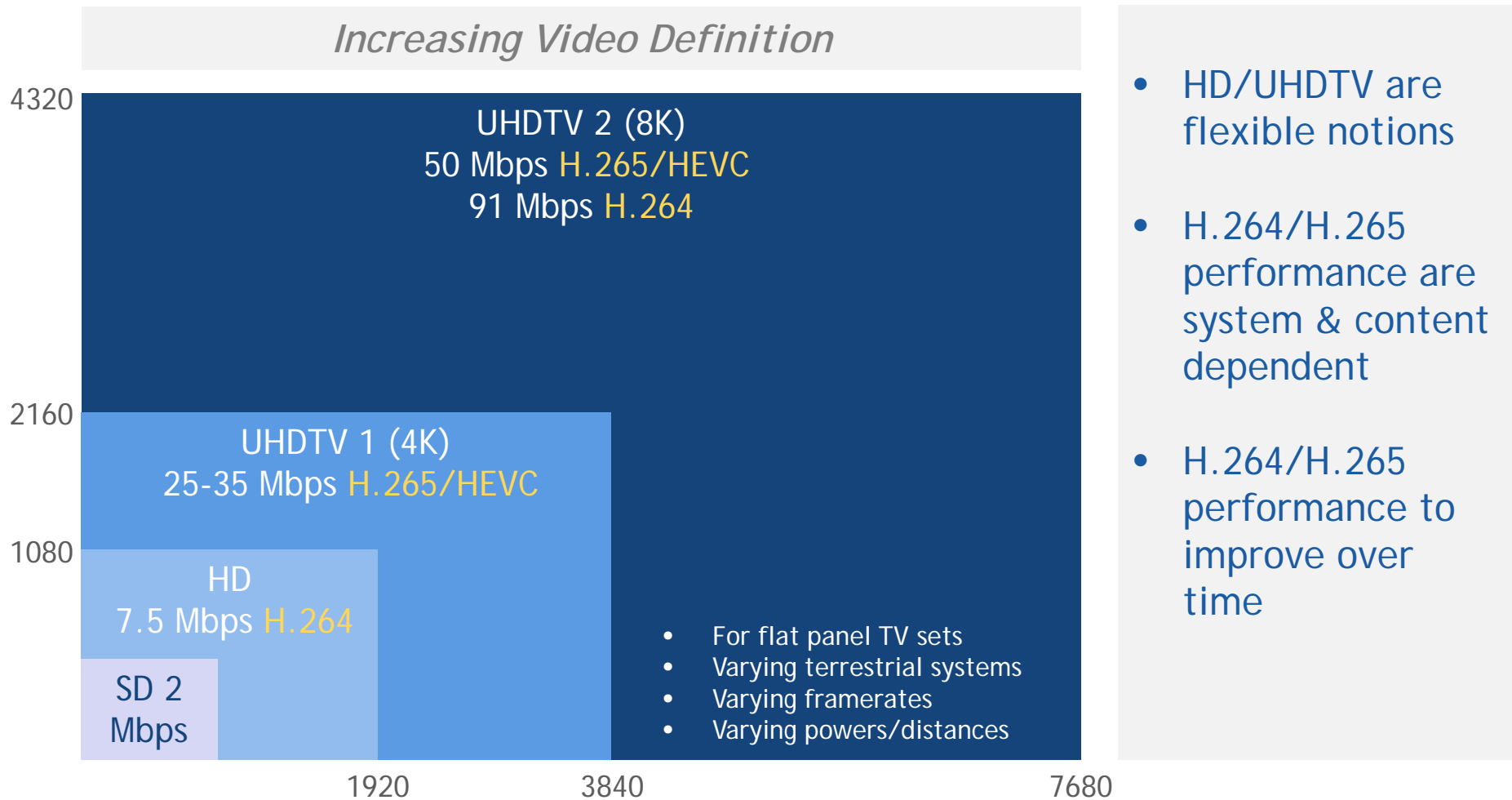
- User preferences are lagging behind technology
- Broadband and OTT is accelerating time shifting
- Households get smaller and content 'can' be tailored at home

Presentation Overview

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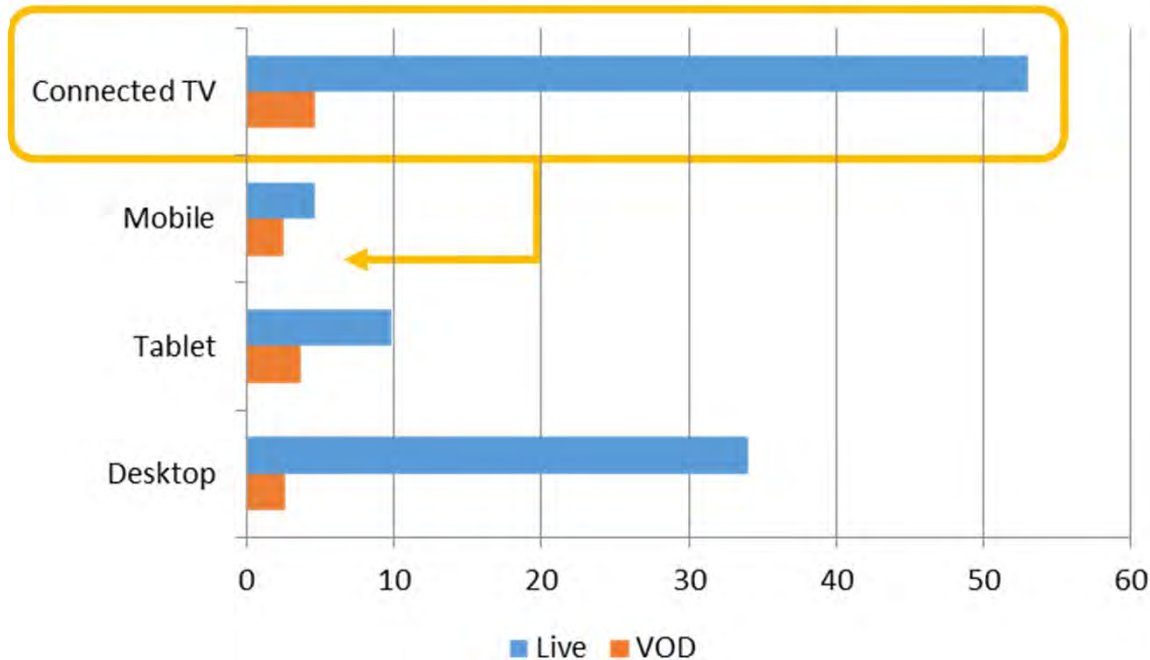


3. Race for capacity



3. Race for capacity

Minutes per session per device



Source: OYALA

- Globally busy hour will be 3.3 x higher than average hour by 2018
- Live not restricted at home and mobile to follow
- Live on mobile is likely to be premium content
- Video (= Live + VOD) on mobile will be very spiky
- How to allocate spectrum efficiently?

Thank you !



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