



Is DTT vital?

It is a very efficient way of delivering  
content to mass audiences ...



No other platform promises the  
same population coverage

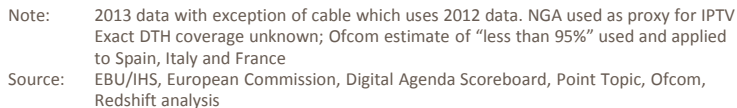
**EBU**

Note: Data correct as of 2012 with exception of Bulgaria which uses 2014 data  
Coverage data shown is that of the national MUXs with the highest coverage

Source: EBU/IHS, Radio Spectrum Policy Group, Redshift analysis



*(accounts for technical transmission and reception equipment, however does not account for consumer affordability)*





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Around the world

# DTT prospects

A world map with red lines connecting specific countries to text boxes. The countries highlighted in red on the map are Mexico, Brazil, Argentina, Turkey, Russia, Japan, Hong Kong, Thailand, Indonesia, Malaysia, and Botswana. The text boxes provide details about DTT (Digital Terrestrial Television) prospects for each of these regions.

## Mexico

ATSC standard. ASO planned for 2015 (90% DTT coverage required in each state)

## Turkey

DTT launched in past year; 33 national licenses awarded. ASO planned for 2015

## Russia

Current investment and expansion in DTT. ASO planned for 2015

## Japan

Governmental support for regular transmissions in 8k over DTT by 2020; ISDB-T

## Hong Kong

DTT launched 2007, now with over 99% coverage. 80% of households receive DTT

## Thailand

DVBT-2 adopted 2012. 95% coverage by 2017 with 39 MFN main sites, 127 SFN sites and gap fillers

## Indonesia

Launching DTT, DVBT-2 on UHF with over 400 transmission sites and large investment. 2018 ASO

## Malaysia

\$2bn investment in DTT network planned over next 15 year license period

## Botswana

DTT using ISDB-T from 2013 with over 85% coverage

## GOtv in 9 African nations

Strongly performing pay DTT platform operating across a large network using DVB-T2

## Brazil

Widespread DTT usage on ISDB-T. Political and commercial importance

## Argentina

Launched in 2010; 80% coverage; ISDB-T; strong pay and FTA DTT

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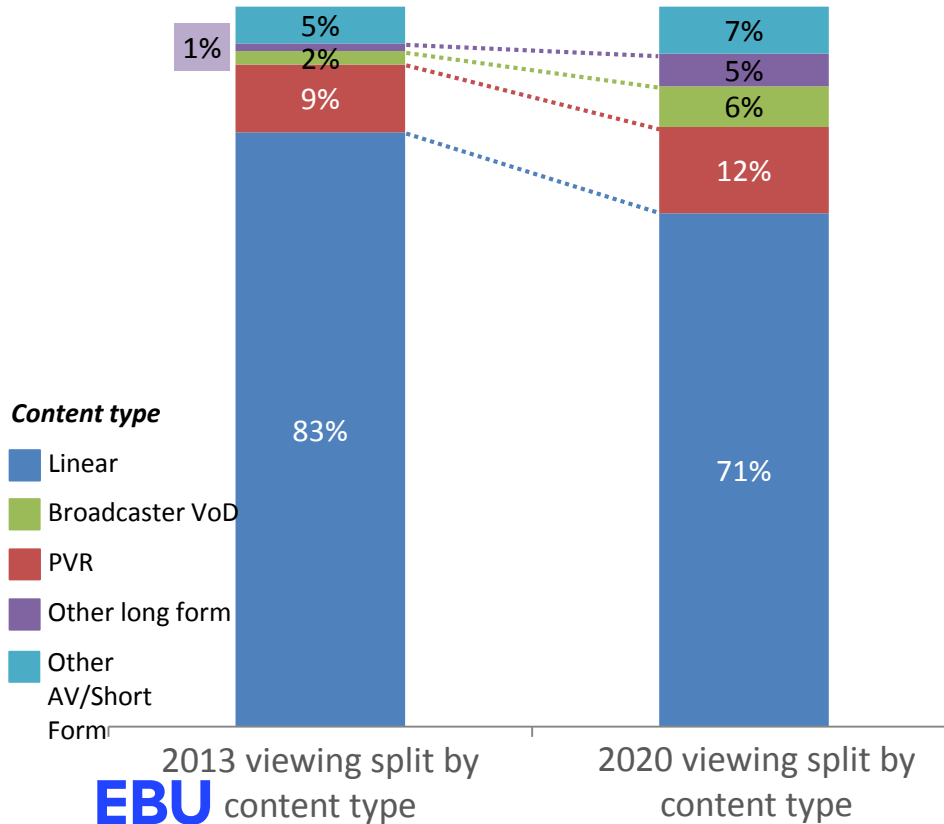


For many countries:  
linear TV = DTT

Now and for the foreseeable future

# UK viewing across all screens

## Proportion of total viewing time, split by content type



Source: Ofcom, Redshift viewing model

## Key viewing trends

- Europeans watch over 4 hours of TV a day
- Linear viewing is forecast to fall as a proportion of total viewing from 83% in 2013 to 71% in 2020
- During this period linear viewing remains robust despite:
  - Increasing connected device penetration, enabling widespread access to non-linear services
  - Changing device viewing preferences (i.e. a significant increase in mobile and tablet viewing)
  - The evolution of TV UIs, increasingly promoting on demand viewing
  - Increasing investment in content by SVoD players such as Netflix, Amazon and Microsoft
  - The evolution of viewing habits as awareness of and familiarity with using VoD services increases over time



# Conclusions

- Broadcasters have many obligations
  - Reaching their audiences is key
- More and more sophisticated devices means stressing access networks
  - Key driver is video
  - But DTT could handle it – if it was let ....
- DTT will remain a cornerstone of video consumer amongst mass audiences until at least 2030.