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OTT Joint EGTI+EGH Sub-Group
Presentation of report

Joint EGTI and EGH session

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Outline

1. Context for the Joint Sub-group's work
2. Conclusions
   a) Overarching considerations
   b) Provider / supply side perspective
   c) User / demand side perspective
3. Recommendations

1/ 2022 Recommendations as basis for JSG work in 2023

Across perspectives

- Building knowledge base and mechanisms for exchange on practical questions.
- Enquiry into non-traditional data collection approaches.
- Exploration of data triangulation.

User / demand perspective

Promotion of, systematic enquiry into and evaluation of HH9 collection, including as basis for possible approaches to close data gap.

Provider / supply perspective

Develop OTT communications data collection guidance, considering evolving Member State practices.

EXTENSION OF JSG MANDATE

2a/ Overarching considerations

1. Salience: OTT has captured policy-making interest in wider range of jurisdiction, for a variety of reasons.
2. Relevance: EGTI's OTT definition continues to constitute a relevant framework for thinking about data collection.
3. Technicity: OTT measurement requires significant amount of technical understanding.
4. Involvement: OTT data collection practices are still nascent; overall, limited number of cases.
5. Resources: OTT data collection is resource-intensive.

2b/ Conclusions: Provider / supply side

1. Deliberations confirmed **appropriateness and usefulness of JSG reference framework for considering OTT data collection**.
2. Data **encryption** constitutes an **important obstacle** to successful and accurate traffic identification.
3. **Source selection** remains a vexing matter.
4. Scarcity of data collection practices.
5. The **normative embeddedness** of data collection is essential.

2c/ Conclusions: User / demand side (1)

1. Data availability: Member States reporting HH9 categories related to OTT traffic are uneven between regions. Data is not collected periodically.
2. Cases analyzed displayed a wide range of indicators, reinforcing the need for standardization at the international level.
3. Frequency of use was found to be viable option due to a good level of comprehension and a good hypothesis.
4. Scope was defined from the HH9-related categories: Making calls, Listening to web radio, Watching web television, and Streaming. Since behavior might differ amongst the activities under one single item, it is recommended to ask for frequency separately.

2c/ Conclusions: User / demand side (2)

Model Question – Proportion of individuals performing online activities, by frequency.

Filter question: Respondents who said yes to corresponding HH9 Category.

	In the past 3 months, how often have you…	**At least once a day**	**At least once a week**	**Less than once a week**	(Don't perform the activity)
A	Made telephone calls				
B	Made video calls				
C	Listened to web radio				
D	Listened to music on streaming				
E	Watched web television				
F	Watched videos on streaming				

2c/ Conclusions: User / demand side (3)

1. Model question reflects structure of the indicator for international reporting. The questionnaire needs to allow local adaptation and possible examples for clarity, e.g.:
   - Making telephone calls *over Whatsapp or Telegram*
   - Watching videos on streaming *such as Netflix and Globoplay*
2. Some case studied asked directly about brands with the goal of measuring them specifically. It is expected that the estimates of users are reported by category of services rather than brands.
3. Response categories were derived from HH12 - Frequency of Internet use: 'At least once a day', 'At least once a week', 'Less than once a week'. As HH9 categories might correspond to several different items, there is a need for a no-use category (Don’t perform this activity).

2c/ Conclusions: User / demand side (4) Implementation – Full version

Activities - HH9			IF YES, THEN ASK - Frequencies
Making calls (telephoning over the Internet/VoIP using Skype, WhatsApp, Viber, iTalk, etc.; includes video calls via webcam)			
Yes (X)	NO( )	>>>	Made telephone calls Made video calls
Listening to web radio (either paid or free of charge)			
Yes (X)	NO( )	>>>	Listened to web radio
Watching web television (either paid or free of charge)			
Yes (X)	NO( )	>>>	Listened to music on streaming
Streaming or downloading images, movies, videos or music; playing or downloading games (either paid or free of charge)			
Yes (X)	NO( )	>>>	Watched web television Watched videos on streaming

2c/ Conclusions: User / demand side (5) Implementation – Partial version

Activities - HH9	IF YES, THEN ASK - Frequencies
Making calls (telephoning over the Internet/VoIP using Skype, WhatsApp, Viber, iTalk, etc.; includes video calls via webcam) Yes (X) NO( ) >>>	Made telephone calls Made video calls
Listening to web radio (either paid or free of charge) Yes ( ) NO(X)	Listened to web radio
Watching web television (either paid or free of charge) Yes ( ) NO(X)	Listened to music on streaming
Streaming or downloading images, movies, videos or music; playing or downloading games (either paid or free of charge) Yes (X) NO( ) >>>	Watched web television Watched videos on streaming

3/ Recommendations

Shared foundations

- Maintain and grow knowledge base
- Promote exchange in EGH and EGTI fora
- Periodic review of Member State data collection practices

User / demand perspective

Call for Member States to collect HH9 categories related to OTT.
Addendum to Manual elaborating new indicator on frequency for those HH9 categories.

Provider / supply perspective

Continue exchange and reporting on evolving Member State practices at forum level, with emphasis on OTT communications/other and data sourcing.

REFLECTION ON DATA NEEDS

Thank you for your attention!

Back-up: Demand side

A/ ITU Manual for Household Surveys

- Some of the current indicators were identified as relevant to the topic of OTT services, such as:
  - HH9 – proportion of internet users by type of activity
  - HH16 – household expenditure on ICT
- Even though their original design was not intended to measure OTT services, they provide valuable information that serve as a base line for understanding its adoption.
- However, there are some relevant issues on its availability:
  - HH9 has a reasonably high level of availability, but Member States report a varying set of activities
  - HH16 has a lower level of availability due to the nature of the information requiring specific survey vehicles, such as Budget and Expenditure Surveys

B/ Limitations on household data

- Funding
  - Surveys are the most expensive of all data sources
  - Not always available on a regular periodicity
  - Varying intervals between member states
- Respondents
  - Understanding the question
  - Recalling the information
  - Differences related to cultures and languages
- Questionnaire
  - Length of questionnaire is already challenging for statistics producers
  - Asking about categories of activities rather than use of a specific services
  - Counting individuals rather than the amount of data consumed

C/ Cases Analyzed

Brazil – Cetic.br/NIC.br

Colombia – Comision de Regulación de Comunicaciones

Portugal – ANACOM

Saudi Arabia – CITC

Trinidad & Tobago – Telecomunications Authority

Uruguay – Universidad de Montevideo

D/ Dimensions raised from Case Studies

Use of OTT Services

Content Description

Frequency of use / Hours of use

Payment or subscription

Type of access

Reasons to use / not to use

Advantages of OTT over traditional services

E/ HH9 Categories for OTT Services

- Making calls (telephoning over the Internet/VoIP using Skype, WhatsApp, Viber, iTalk, etc.; includes video calls via webcam)
- Listening to web radio (either paid or free of charge)
- Watching web television (either paid or free of charge)
- Streaming or downloading images, movies, videos or music; playing or downloading games (either paid or free of charge)

Back-up: Supply side

C/ Last year's conclusions & mandate (recall)

Last year's recommendations (OTT EGTI SG 2021)

Adopt definition, and

1. Examine the institutional and other framework conditions for data collection on OTT thus defined;
2. Study the technical aspects of OTT with an emphasis on telecommunication-like services ('OTT communications') to identify possible data collection approaches;
3. Evaluate the feasibility of the data collection approaches identified, including in light of ongoing efforts;
4. Define one or several OTT indicators allowing for the widest possible collection … and, if possible and appropriate, conduct trials.