

EBU

WHAT'S ON THE MEDIA HORIZON?

PETER MACAVOCK

European Broadcasting Union

Association of public service media organisations



80+ active Members from 56 countries

40 associate Members around the world

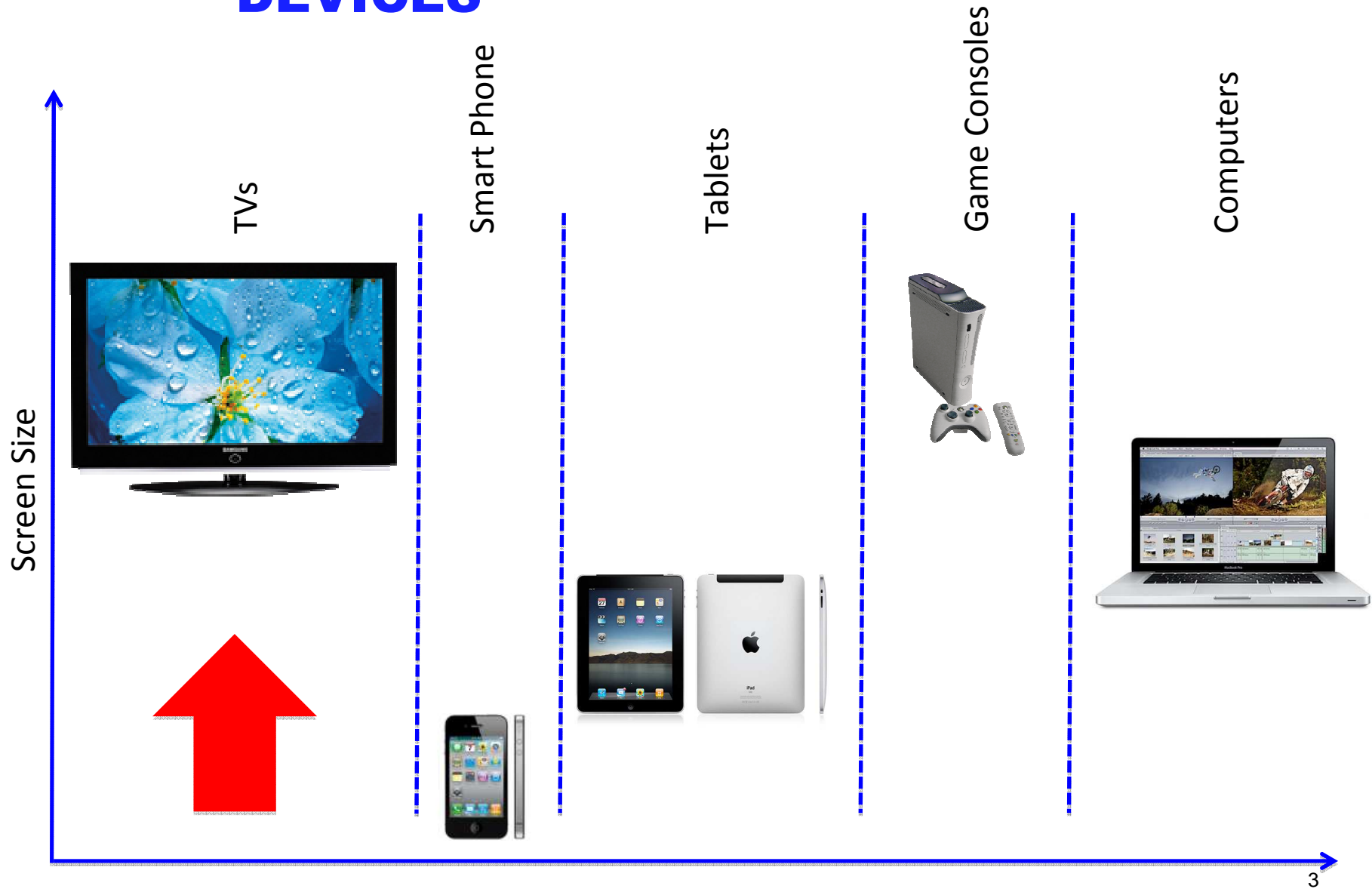
470+ TV channels and 900+ radio channels

195 mil TV households and 600+ mil viewers every week

More than 60 mil people visit EBU Members' web services every day

www.ebu.ch

CHANGES IN MEDIA CONSUMPTION: “DEVICES”



CHANGES IN MEDIA CONSUMPTION “CONTEXT”



Services

		linear push	on-demand pull	social push/pull
Context	shared	1	2	3
	personal	4	5	6
	mobile	7	8	9



Personal 2k display

Mobile TV

TRADITIONAL LINEAR TV

		Services		
		linear push	on-demand pull	social push/pull
Context	shared	1	2	3
	personal	4	5	6
	mobile	7	8	9

THINGS YOU MIGHT NOT KNOW

.....

- Linear viewing still dwarfs other A/V media consumption
 - c.4hrs a day, and increasing
 - 98% of TV services are delivered over broadcast networks
- Viewers now doing other things while watching TV
- Media is consumer indoors
 - Around 90% of Internet traffic is fixed broadband

Context

Services

	linear push	on-demand pull	social push/pull
shared	1	2	3
personal	4	5	6
mobile	7	8	9

+ ONLINE SERVICES

		Services		
		linear push	on-demand pull	social push/pull
Context	shared	1	2	3
	personal	4	5	6
	mobile	7	8	9

TOP WEBSITES IN IRELAND

1. google.com
2. google.ie
3. facebook.com
4. youtube.com
5. yahoo.com
6. wikipedia.org
7. linkedin.com
8. live.com
9. twitter.com
- 10. bbc.co.uk**
11. amazon.co.uk
12. blogspot.ie
- 13. rte.ie**

UK

1. google.co.uk
2. facebook.com
3. google.com
4. youtube.com
- 5. bbc.co.uk**
6. ebay.co.uk
7. yahoo.com
8. amazon.co.uk
9. live.com
10. wikipedia.org
11. twitter.com
12. linkedin.com
- 13. dailymail.co.uk**

Source: alexa.com (based on an average of pageviews & visits per month)

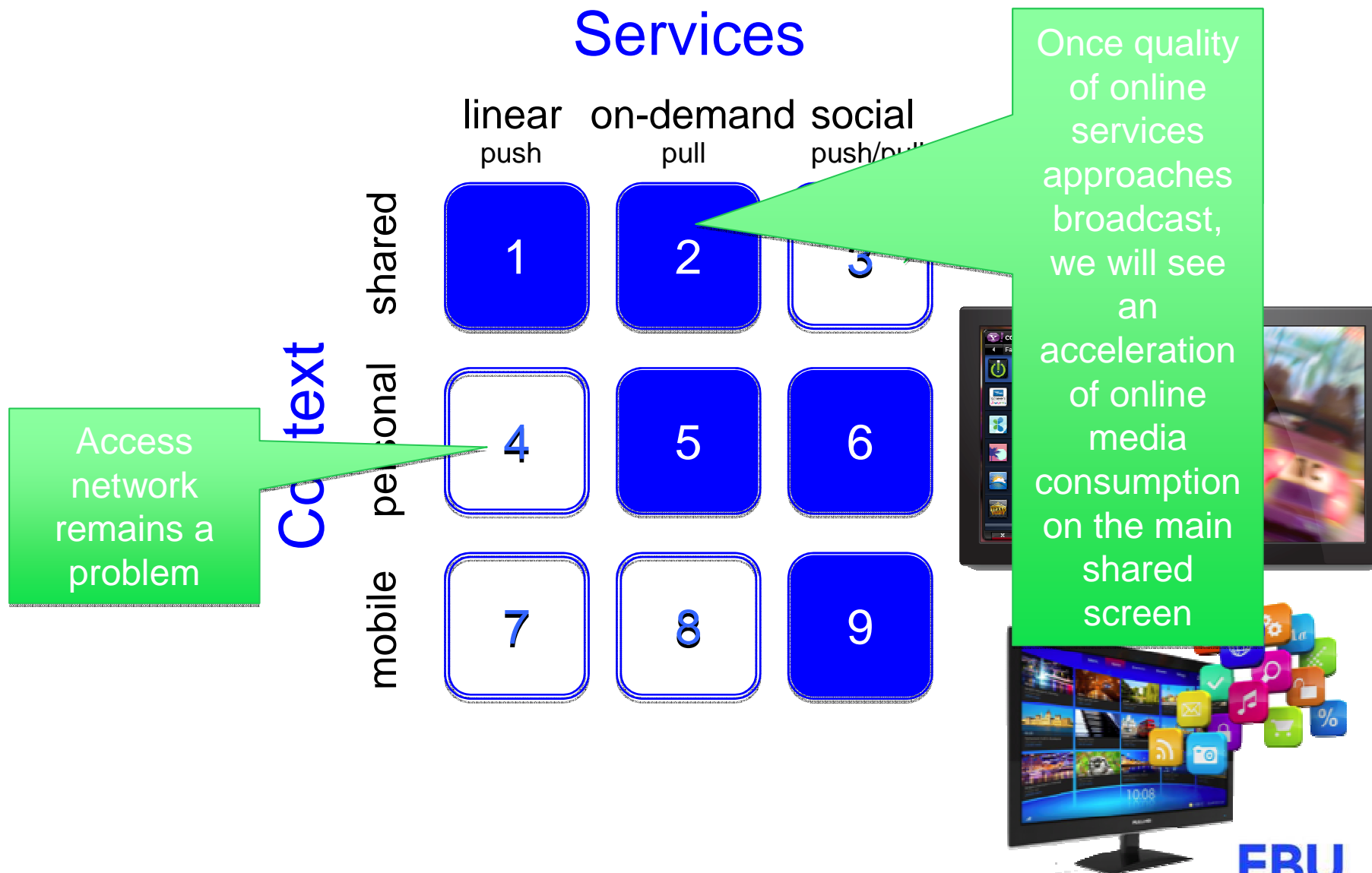
Context

Services

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+ HYBRID

Services



Context

Services

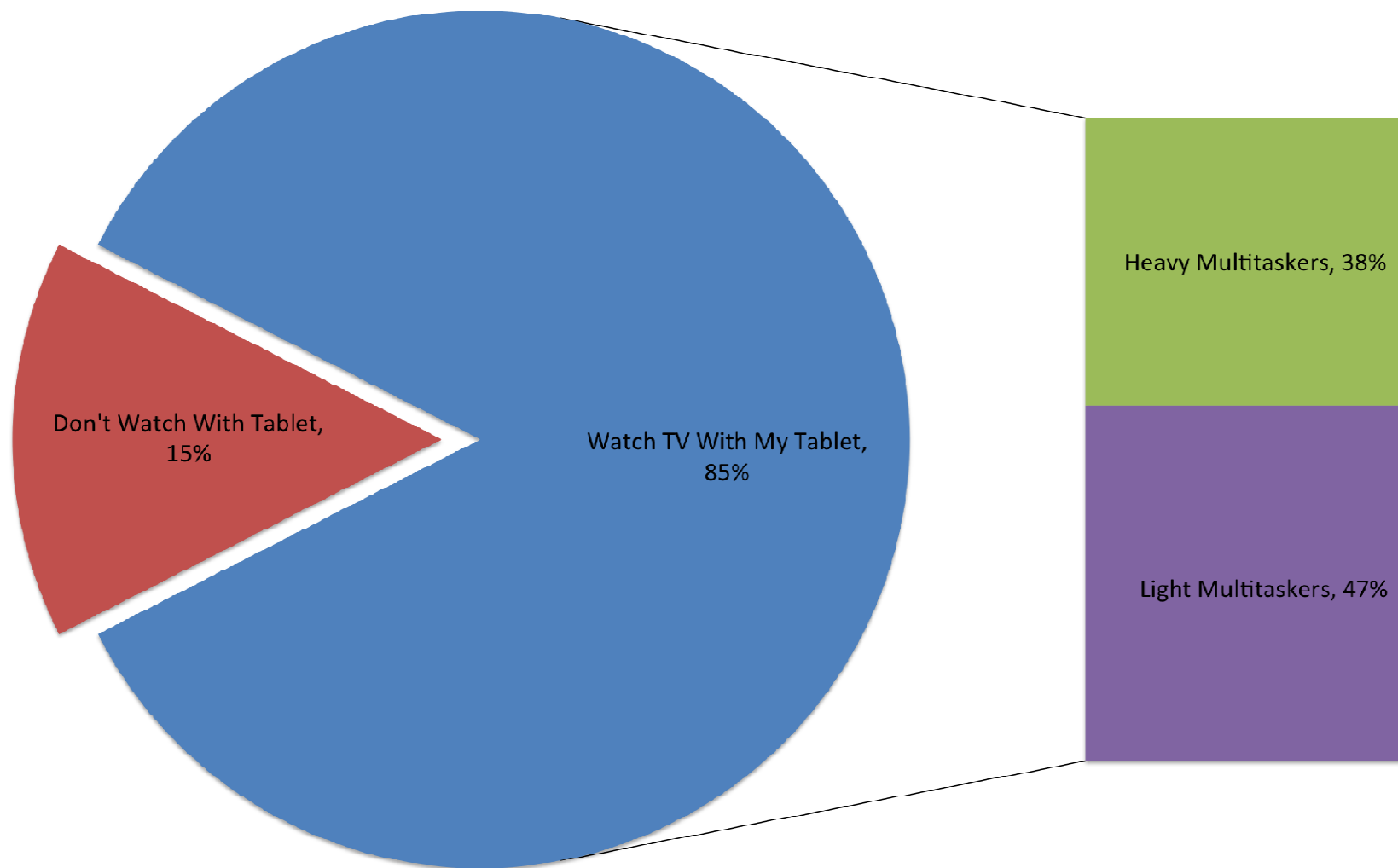
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+ SECOND SCREEN

		Services		
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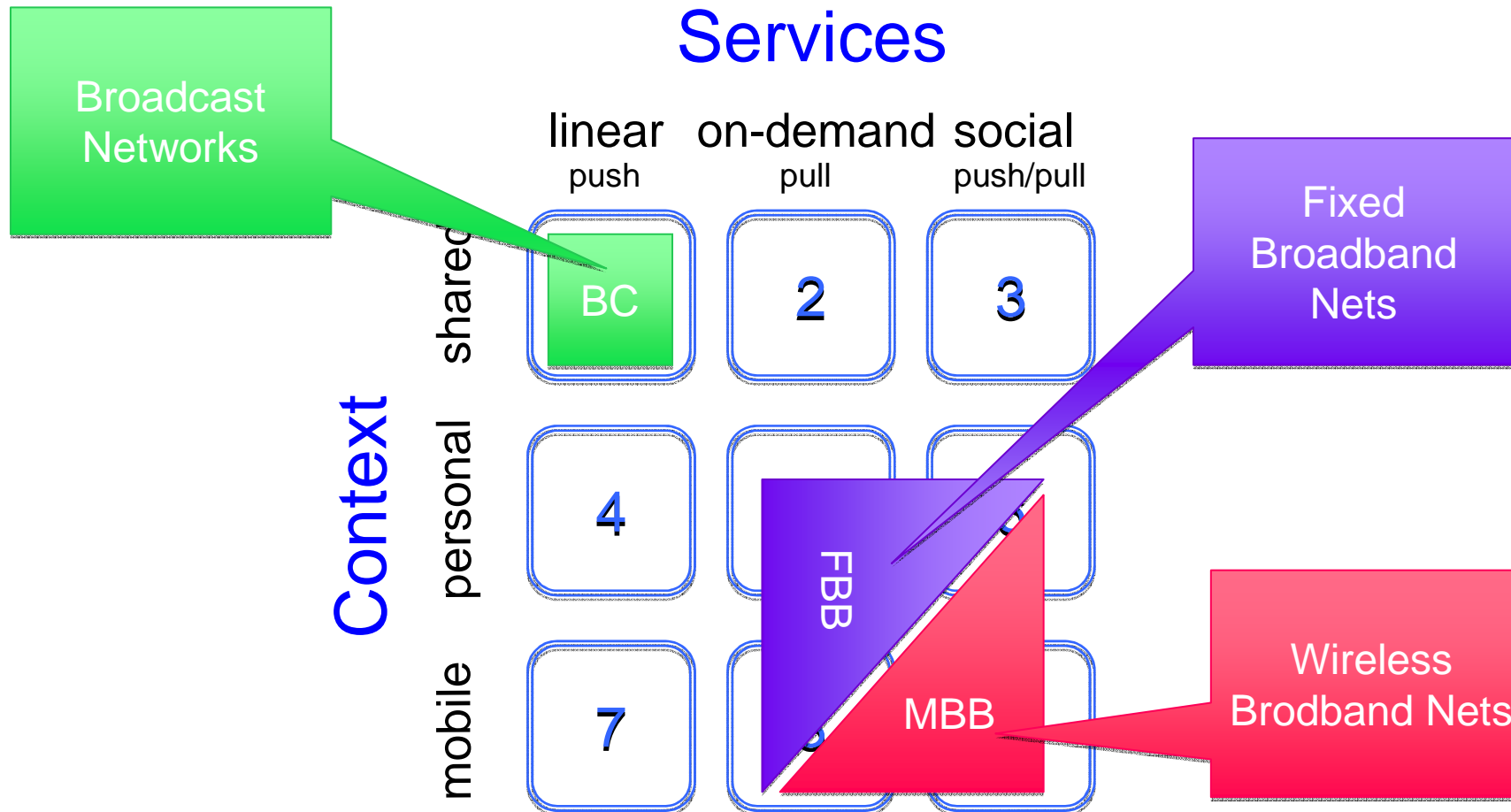
85% Of Tablet Owners Say They Watch TV With Their Tablets



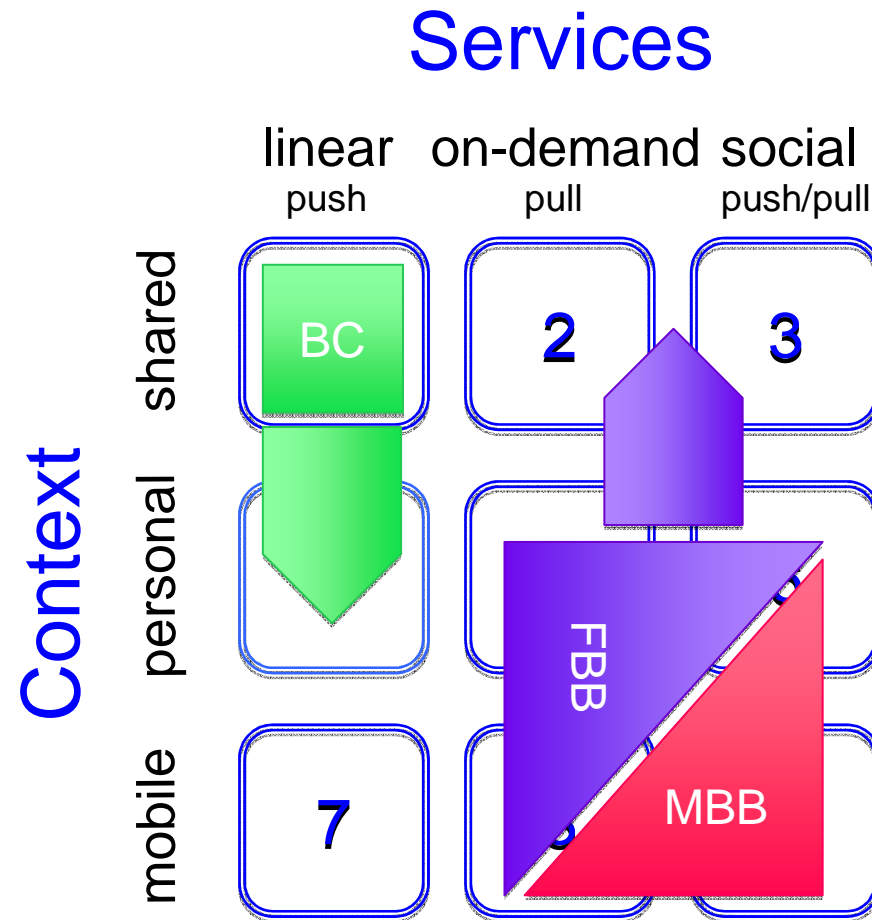
BI INTELLIGENCE

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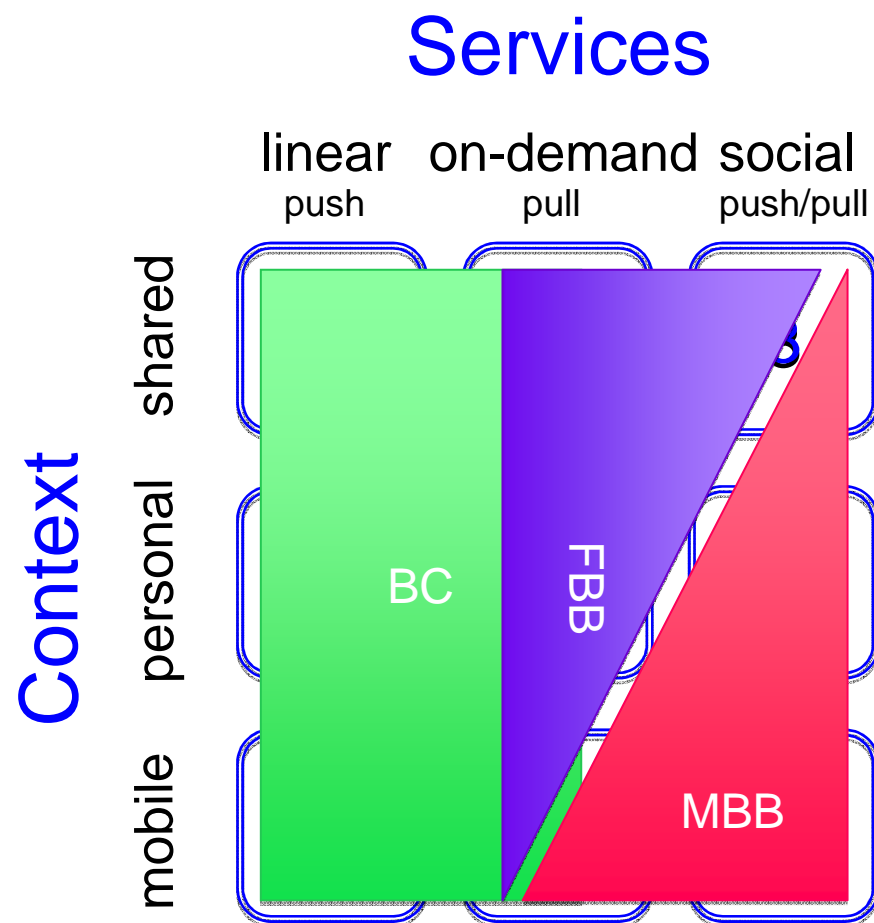
ACCESS NETWORKS



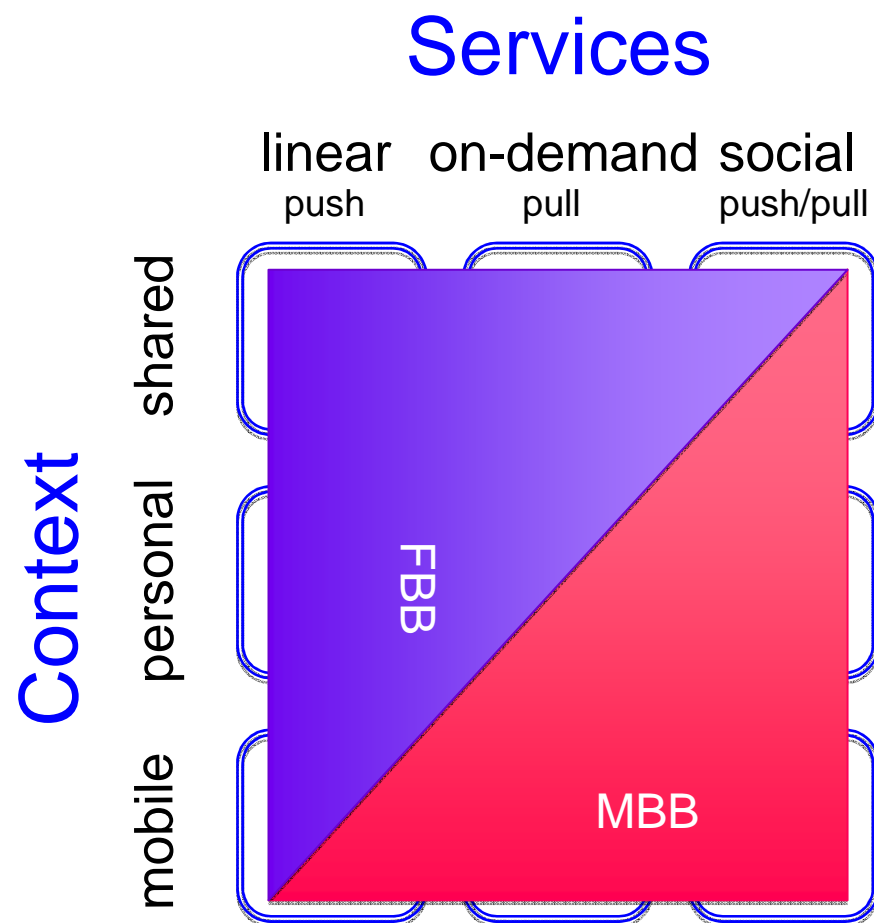
+ HYBRID TV, SECOND SCREEN



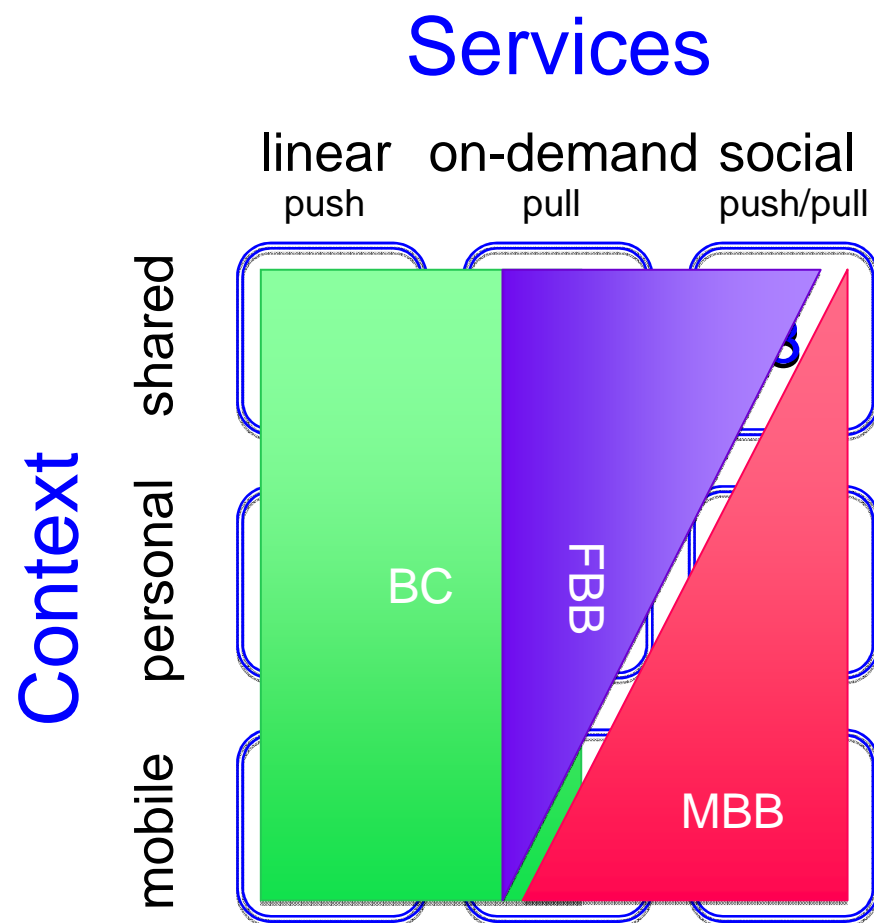
WHERE WE'RE HEADING



I DON'T THINK WE'LL EVER GET HERE



WHERE WE'RE HEADING





Mobile Analytics Report

February 2013



Mobile Video User Experience



2/10 - watch mobile video



2 min

Findings

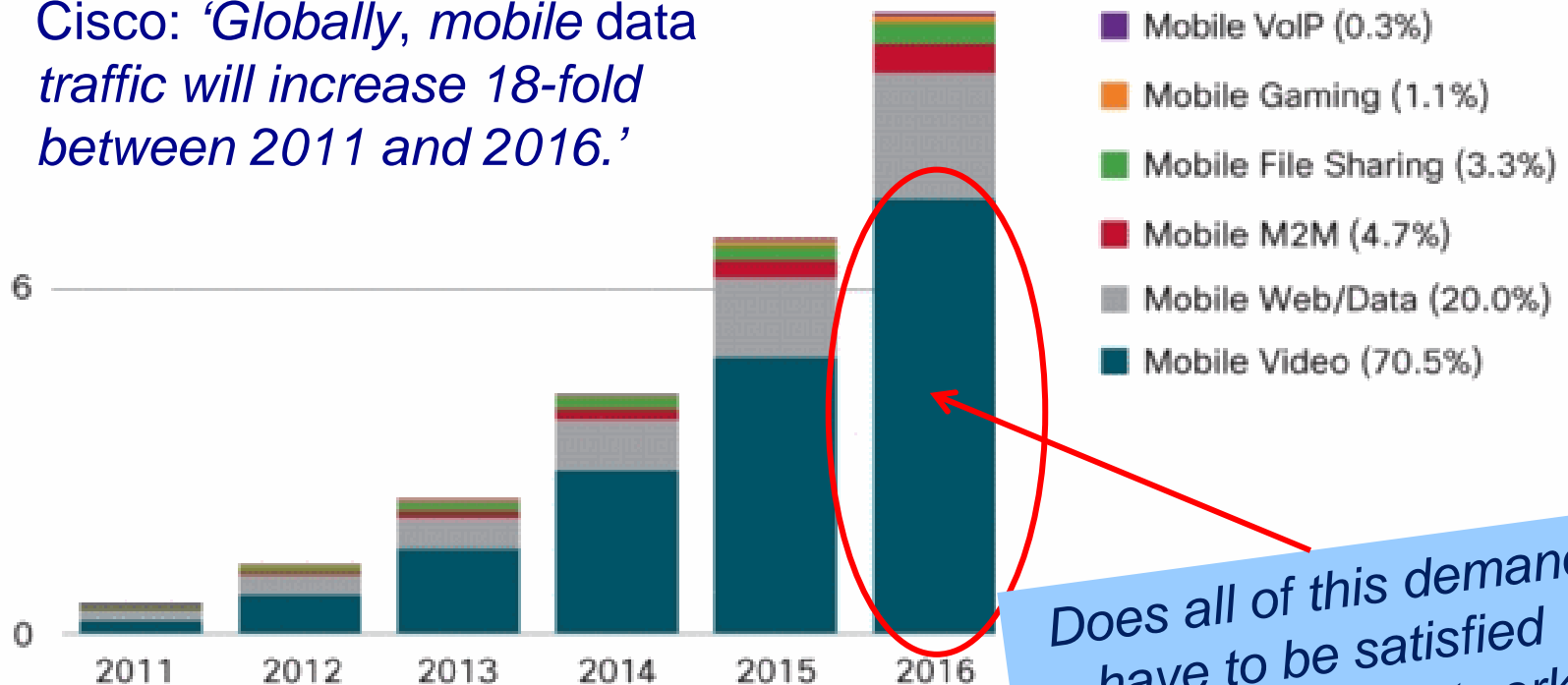
- On average, two out of ten mobile subscribers watch video. However, video generates more than 50% of total mobile data traffic on wireless networks.
- Today, mobile video subscribers watch an average of two minutes of video content at a time. This is double the amount of time spent consuming video as reported in the February 2010 Mobile Analytics Report.

Exabytes per Month

78% CAGR 2011-2016

12

Cisco: 'Globally, mobile data traffic will increase 18-fold between 2011 and 2016.'



Does all of this demand have to be satisfied only by mobile networks?

What growth is economically viable?

CHALLENGES

- Remember on-demand video and live video present different technical challenges
- Video consumes lots of Internet traffic, but that traffic can't be monetized the same way as other services
- Would you pay 18 times more for your mobile phone bill?
- IPv6 & Multicast are not yet deployed in large scale
- LTE MBMS isn't here (will it ever arrive?)
- Broadcasters HAVE TO BE great innovators in media delivery over the Internet. We have no choice, it's costly, but we are rather good at it!

EBU

Thank you

for your attention!

Peter MacAvock

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