



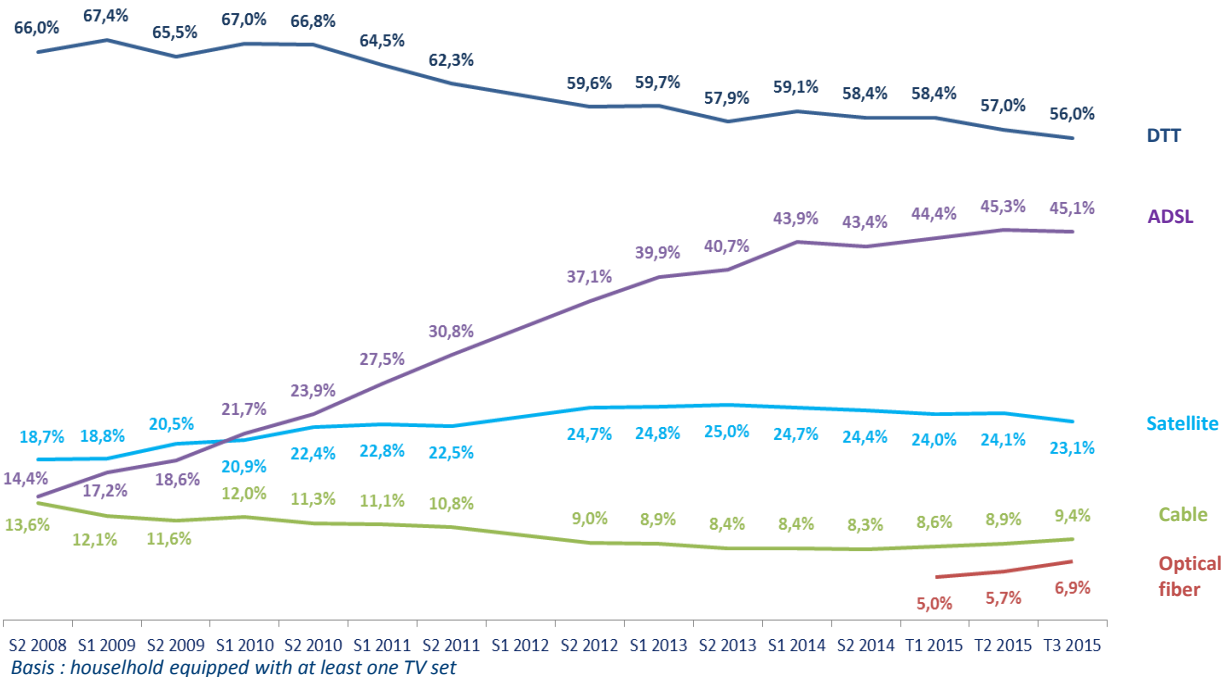
# The future of DTT platform

Nathalie SONNAC

Board Member of CSA (French Audiovisual Regulatory Authority)

EPRA – Barcelona – 26<sup>th</sup> may 2016

# DTT remains the main TV reception platform in France and linear TV consumption is still high



DTT

ADSL

Satellite

Cable

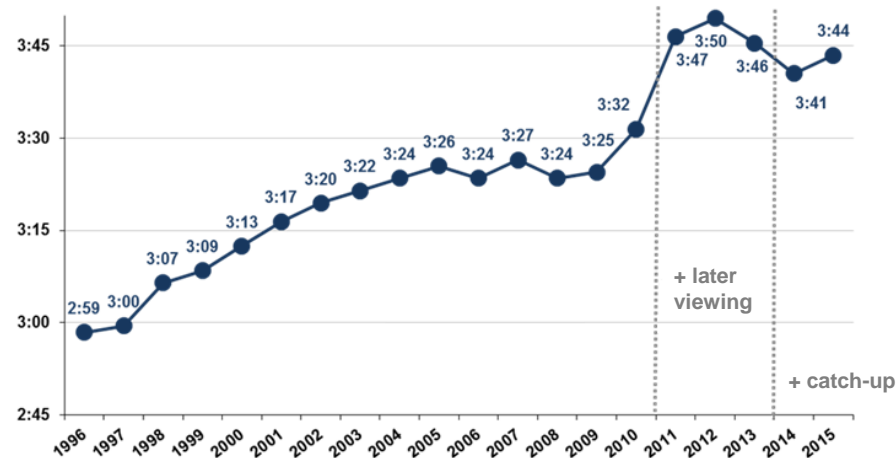
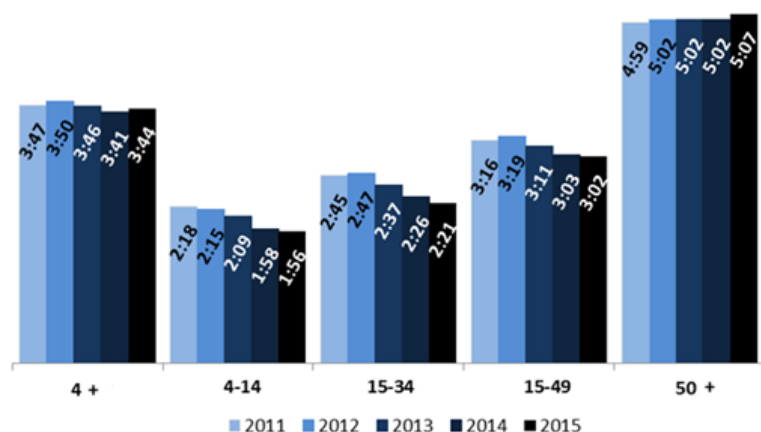
Optical fiber

The penetration trends of the different reception TV platforms have tended to **stabilize** since H1 2014.

At Q3 2015, **31,9 %** of households had at least **two reception** modes. The most common bundle was **DTT and ADSL**.

French **ADSL** network is of **good quality** and **very extended** allowing reception of TV on a large part of the network.

Basis : household equipped with at least one TV set



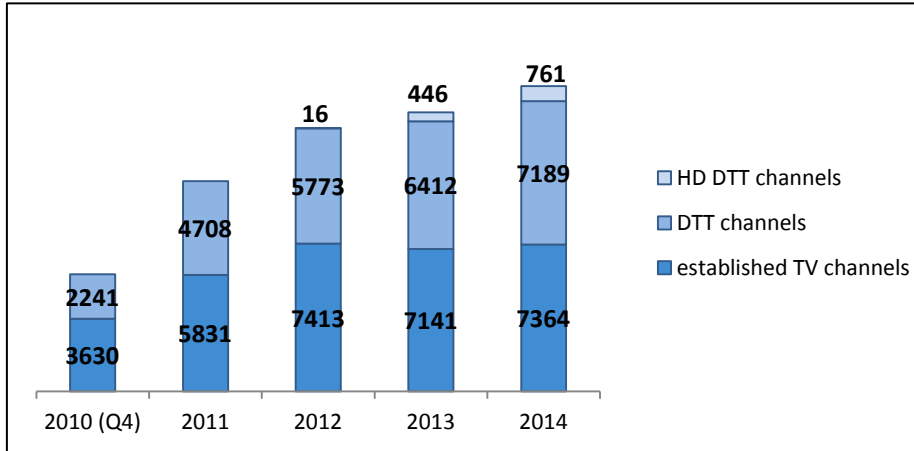
Since 2013, the viewing time of TV has decreased continuously for people aged under 50. However, the daily individual average viewing time is **3h44**.

# But the DTT platform is challenged by non linear services and connected devices

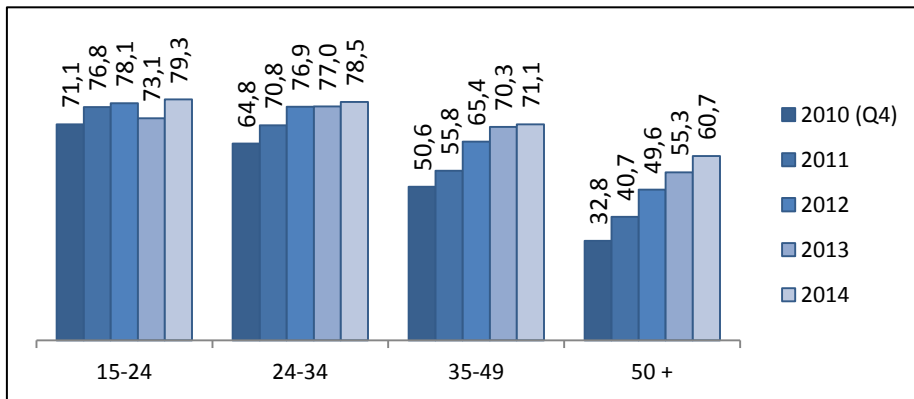


The offer of non linear programs keep on growing and people tend to consume them increasingly, especially the youngest.

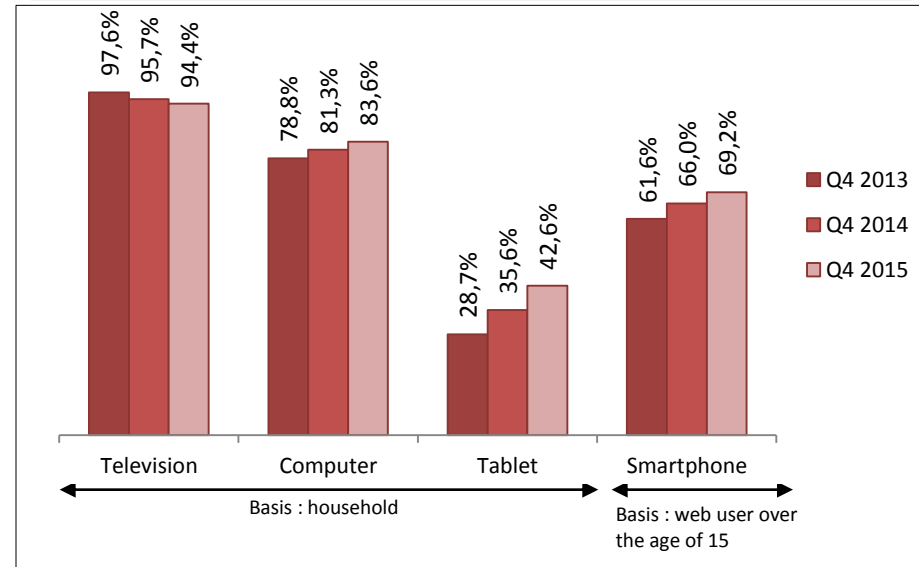
Catch-up TV programs available on the Internet (hours – on a monthly average)



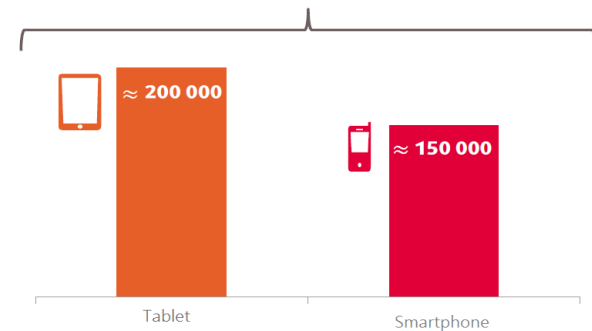
% of TV catch-up users on the last 12 months depending on the age



In 2015, 350.000 more people watched TV (linear or non linear) on a mobile screen. These trends result from the high penetration of connected devices (other than TV) and the new habits (of young users)



+ 350 000 more people watched TV on a mobile screen in 1 year



Digital technologies, based on networks quality (fixed and mobile) transform practices and could get people to continue moving from the DTT platform to wired or mobile platforms.



- ▶ Two frequency bands formerly allocated to broadcasting were transferred **to mobile service** in order to meet the growing needs for wireless broadband services
- ▶ However, these transfer operations should not prevent the **DTT platform's modernization** which remains essential in France for several reasons:
  - ▶ 28 % of people only receive television over the air
  - ▶ It has the merits of quality of services
  - ▶ It is the oldest platform, the simplest and the best known
  - ▶ It contributes to the financing of content creation
  - ▶ It is the only platform that offers free and anonymous access
  - ▶ The DTT platform is able to cover almost all the territory (with satellite)
- ▶ **5<sup>th</sup> of April 2016** : as the 700 MHz band (694-790 MHz) is released, a significant improvement of the DTT platform has been implemented :
  - ▶ The MPEG-4 compression standard (HD) has replaced the MPEG-2 (SD)
  - ▶ Most of the channels are broadcasted in HD with better picture and sound quality