

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

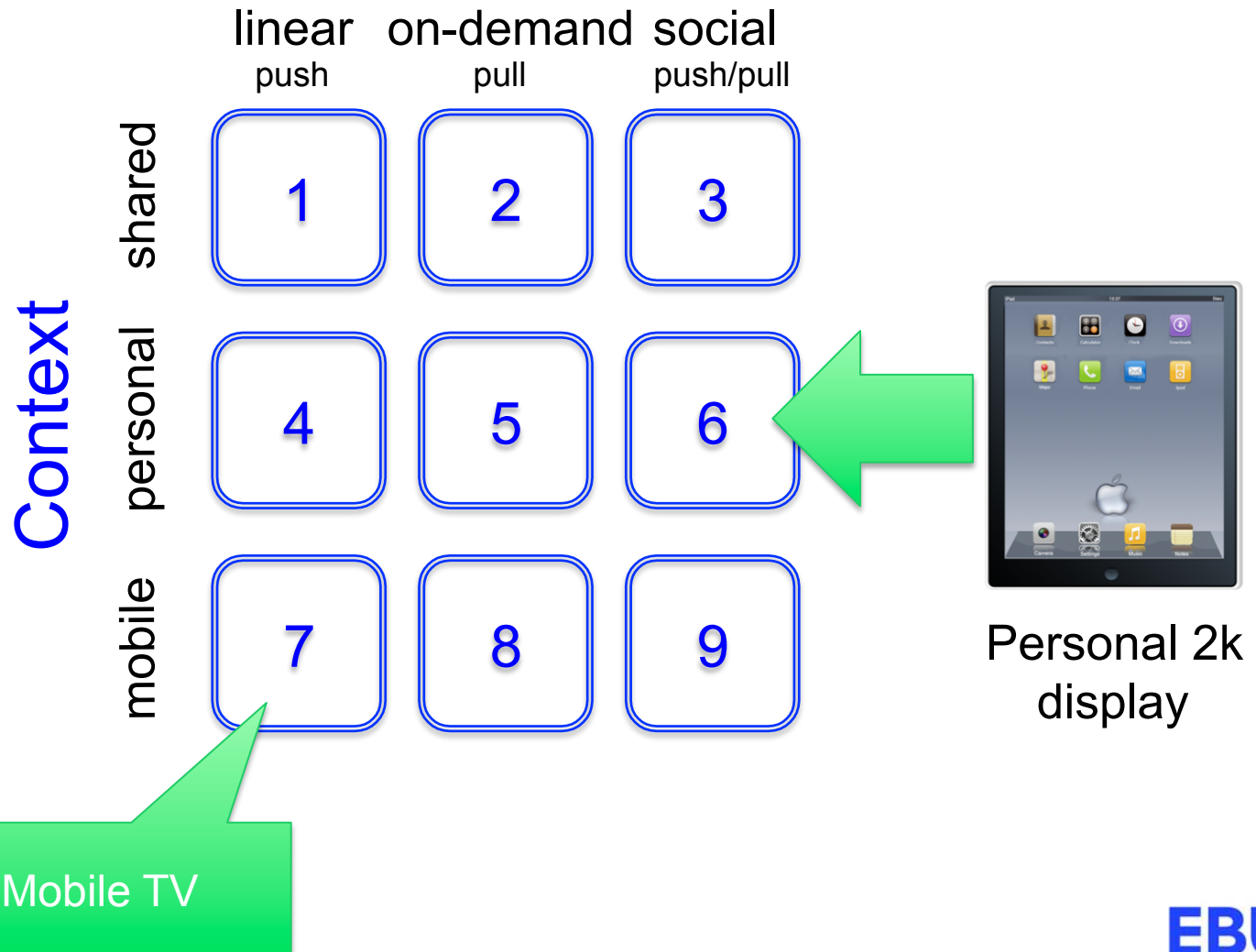
470+ TV channels and 900+ radio channels

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

Services



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 |

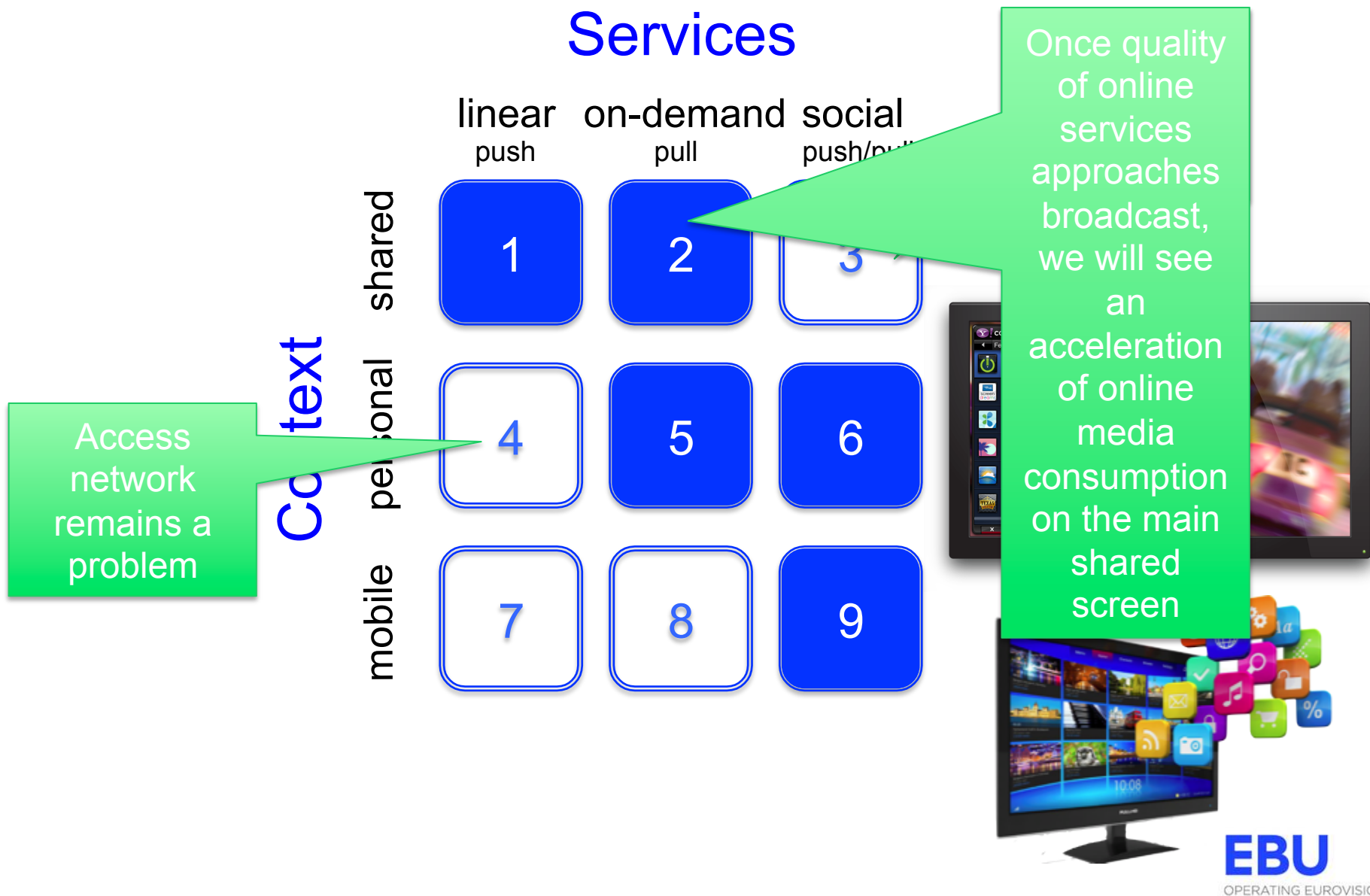
THINGS YOU MIGHT NOT KNOW

- 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

+ ONLINE SERVICES

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+ HYBRID

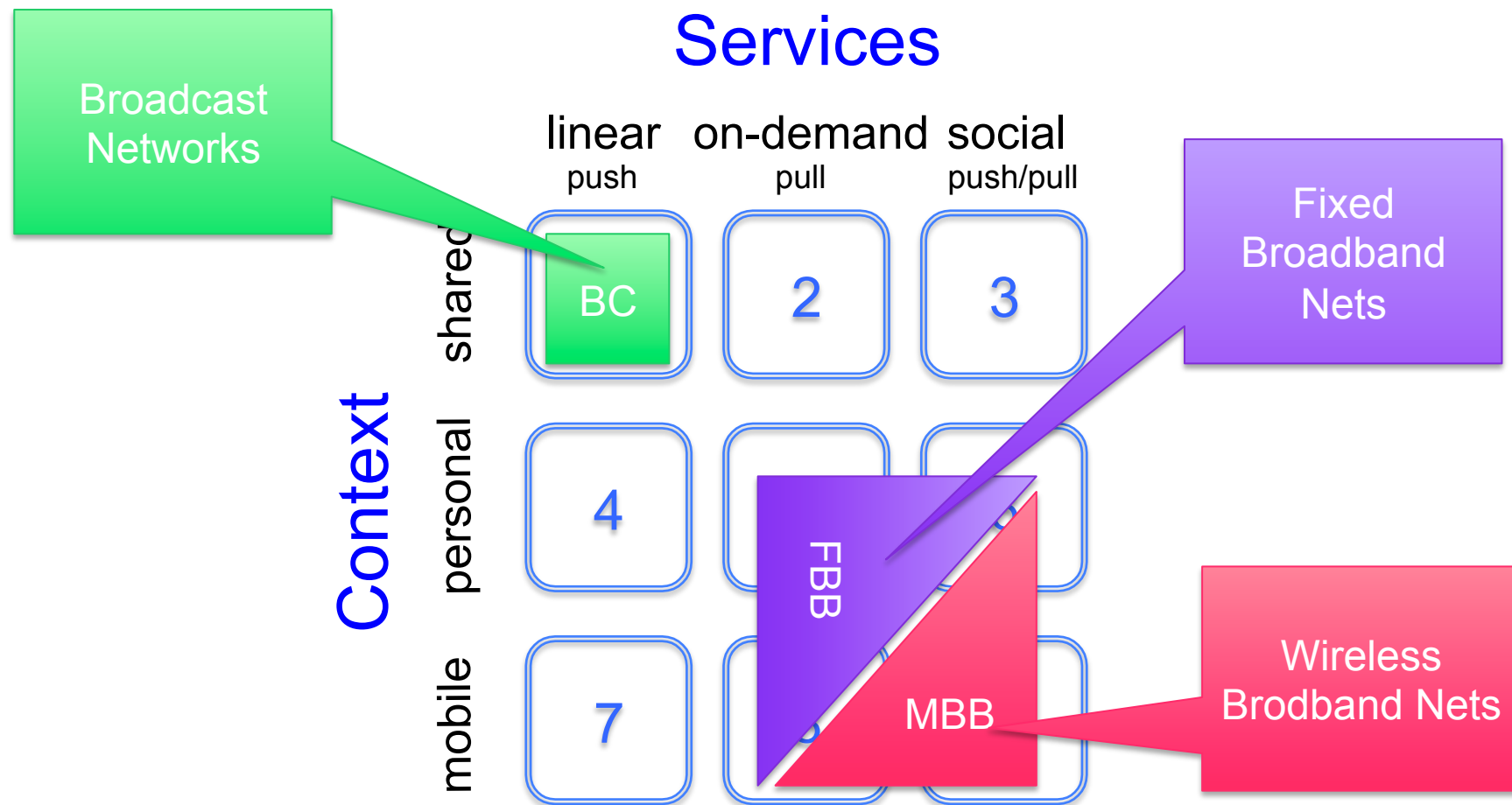


+ SECOND SCREEN

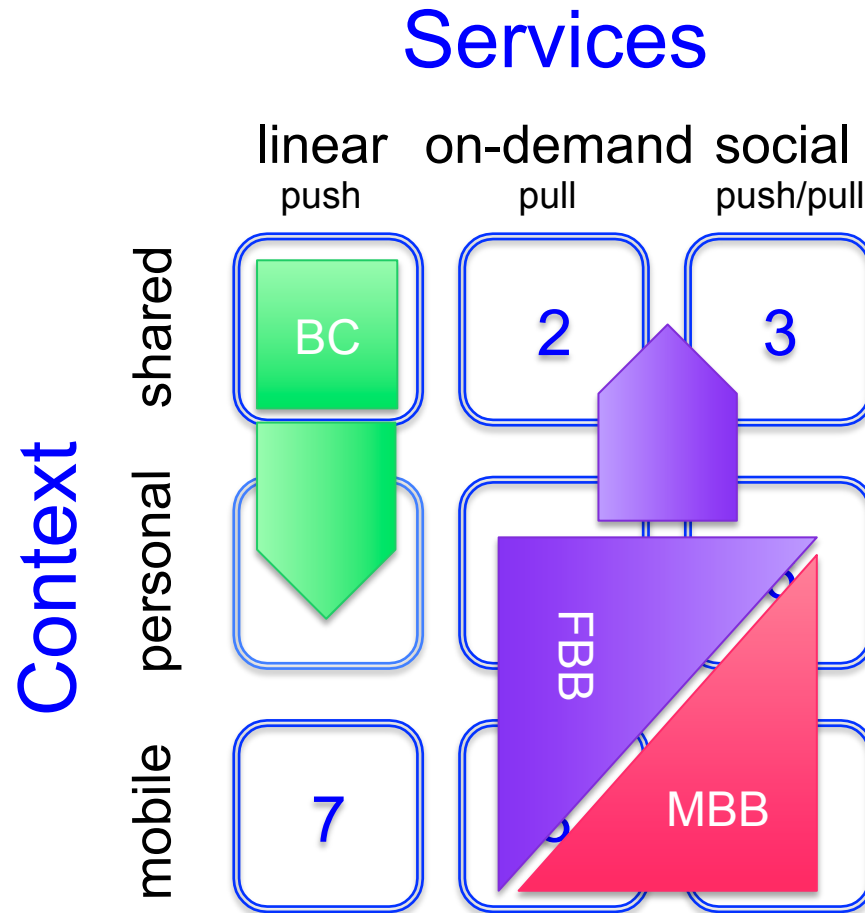
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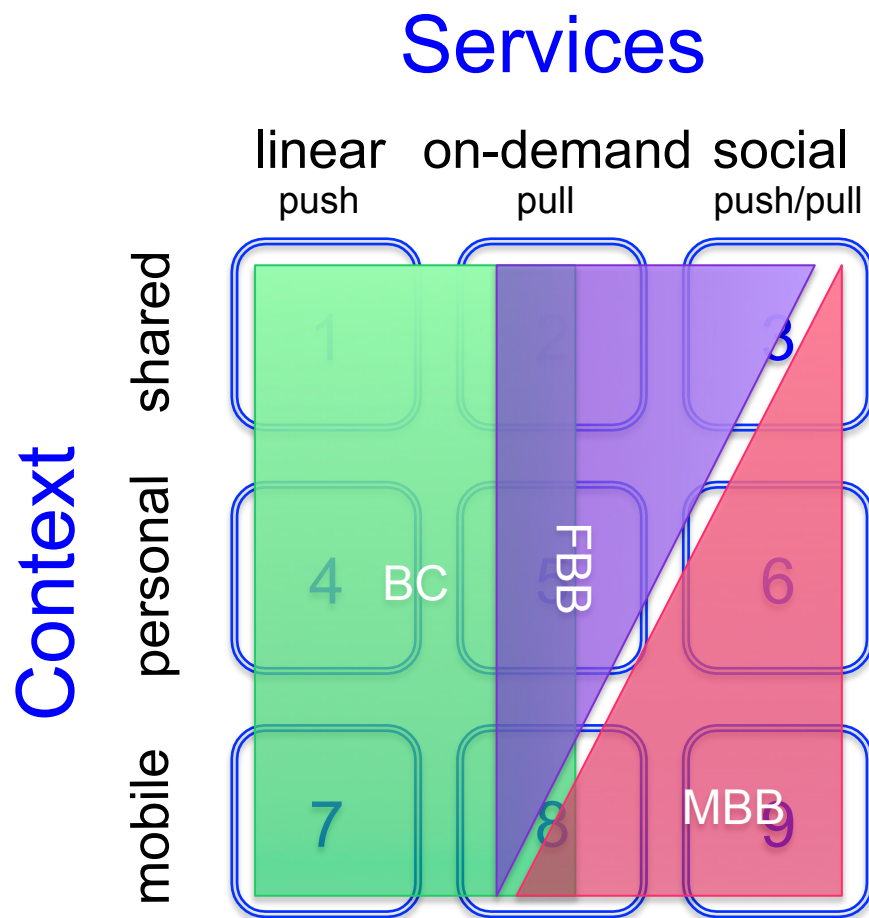
ACCESS NETWORKS



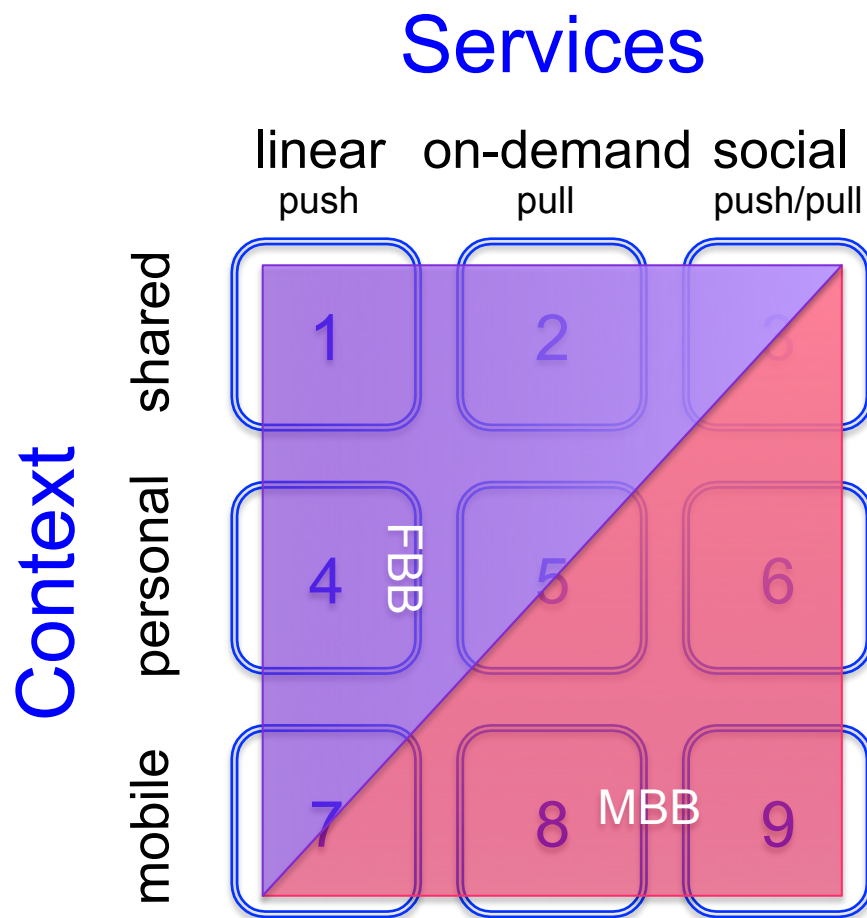
+ HYBRID TV, SECOND SCREEN



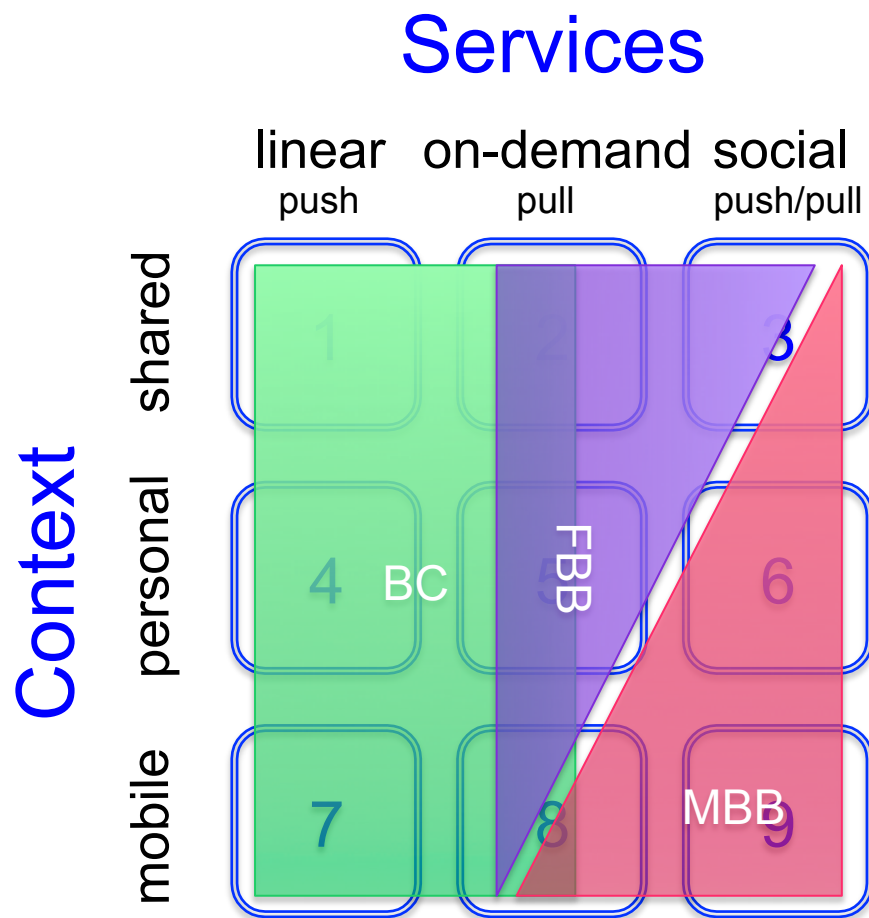
WHERE WE'RE HEADING



I DON'T THINK WE'LL EVER GET HERE



WHERE WE'RE HEADING

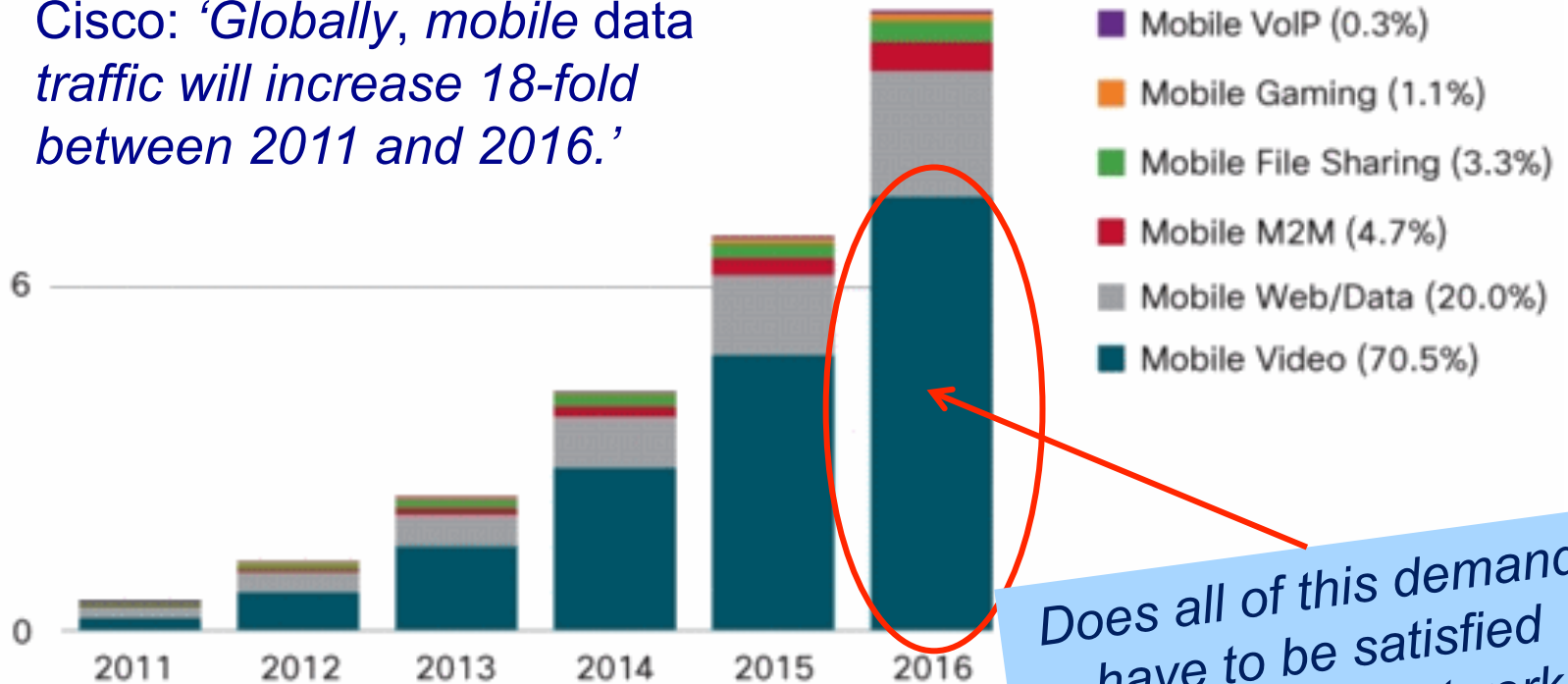


Exabytes per Month

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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