DTT
a catalyzer for
local content production

ITU - 27 October 2016

EBU
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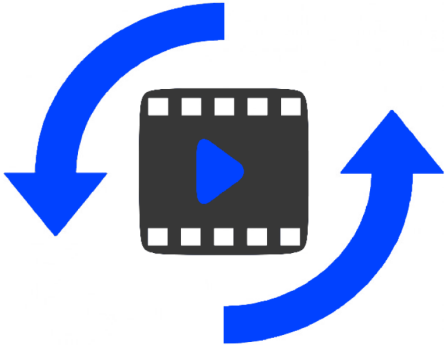
THE WIDER SPECTRUM GROUP

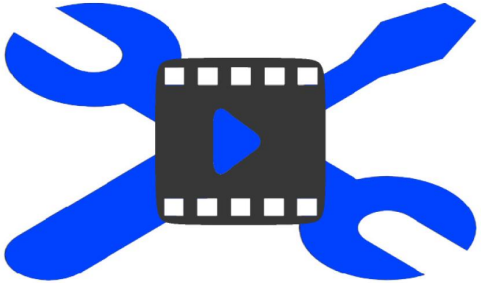
"Spectrum is too serious a matter to be left to engineers"

Olivier Huart - CEO of TDF

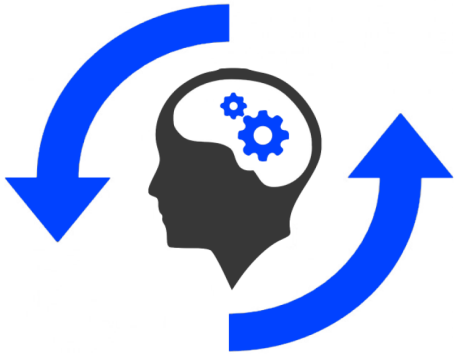
THE BUSINESS OF TV



DISTRIBUTION MODELS



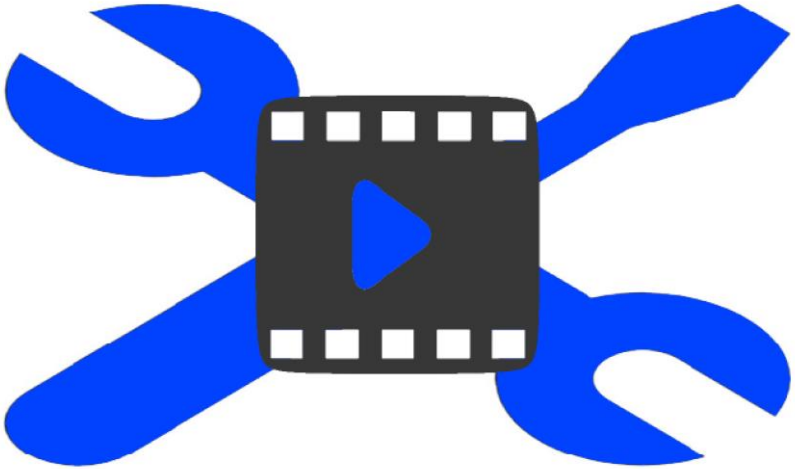
TECHNOLOGY ENHANCEMENT



CONSUMER BEHAVIOUR

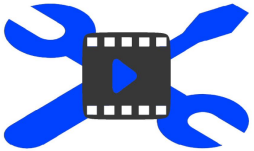
DIGITAL DISRUPTION

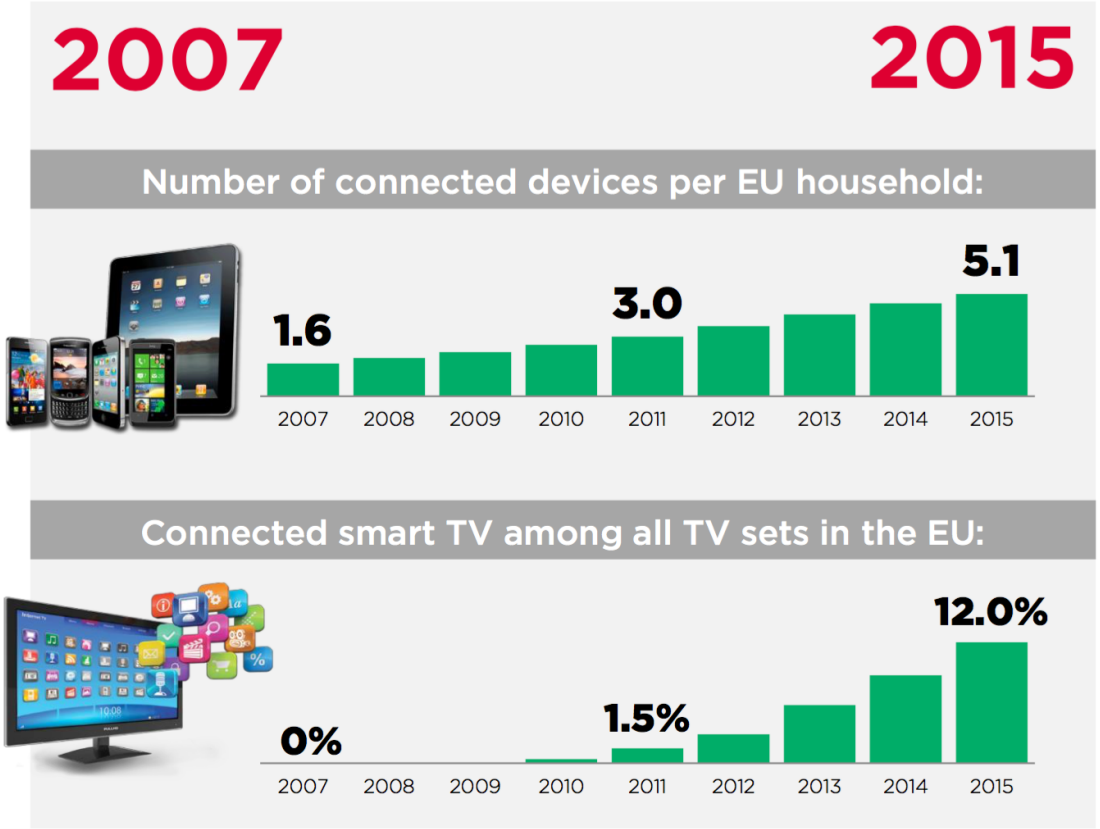
THE BUSINESS OF TV



TECHNOLOGY
ENHANCEMENT

TECHNOLOGY ENHANCEMENT





Enhanced Connectivity

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TECHNOLOGY ENHANCEMENT

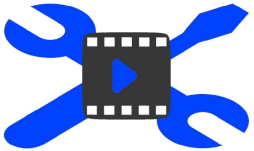
Effective Production

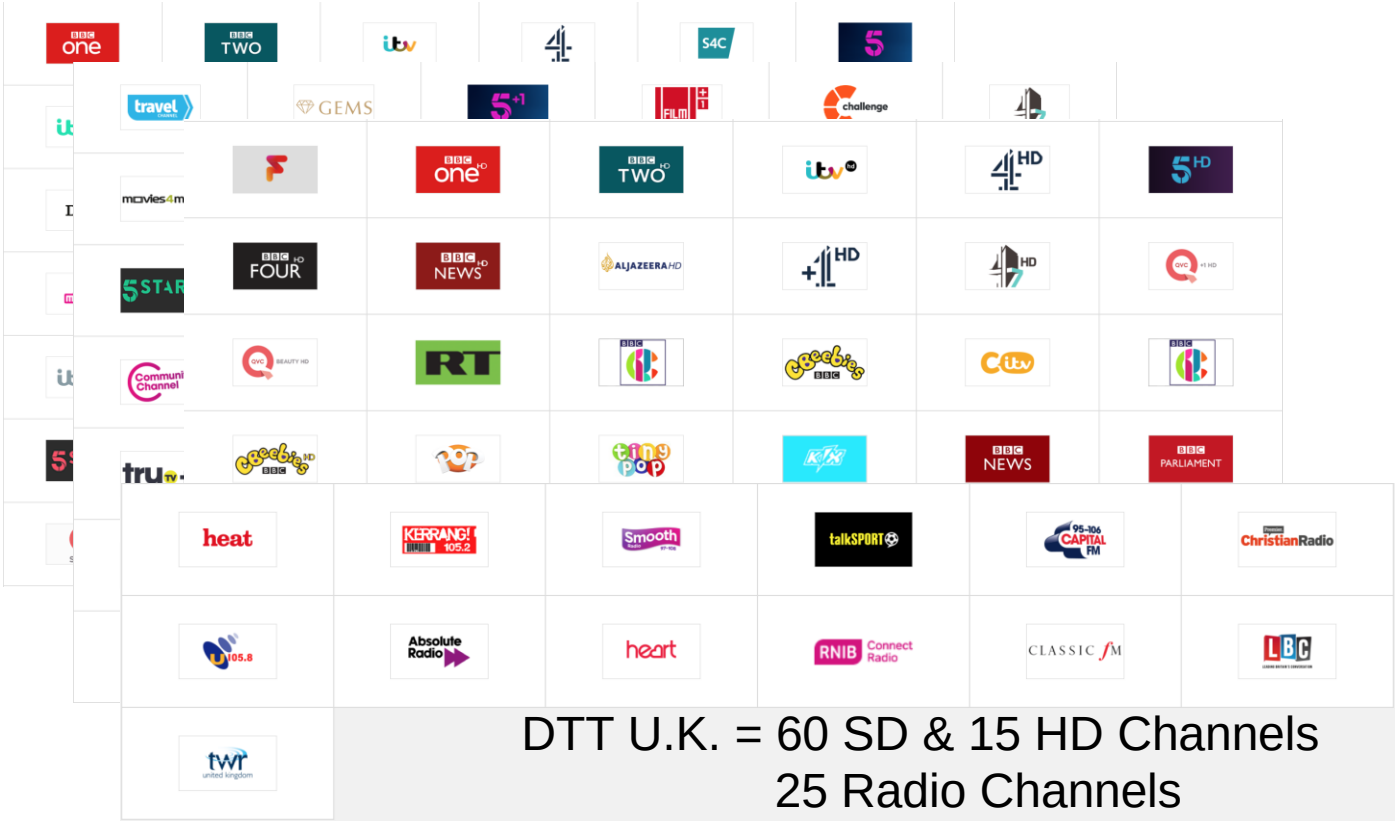
TECHNOLOGY ENHANCEMENT

U.K. Before DTT = 4 Analog Channels

Increased Capacity

TECHNOLOGY ENHANCEMENT





DTT U.K. = 60 SD & 15 HD Channels
25 Radio Channels

Increased Capacity

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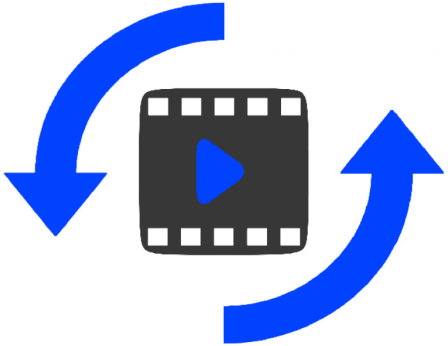
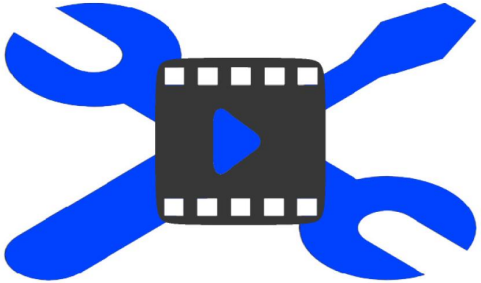


DISTRIBUTION MODELS



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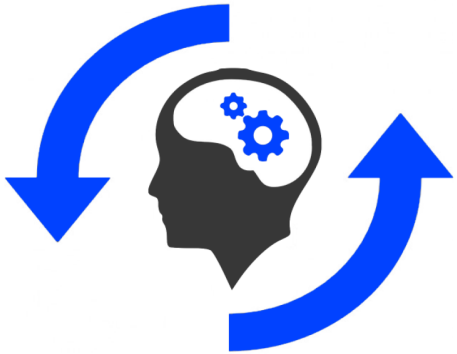
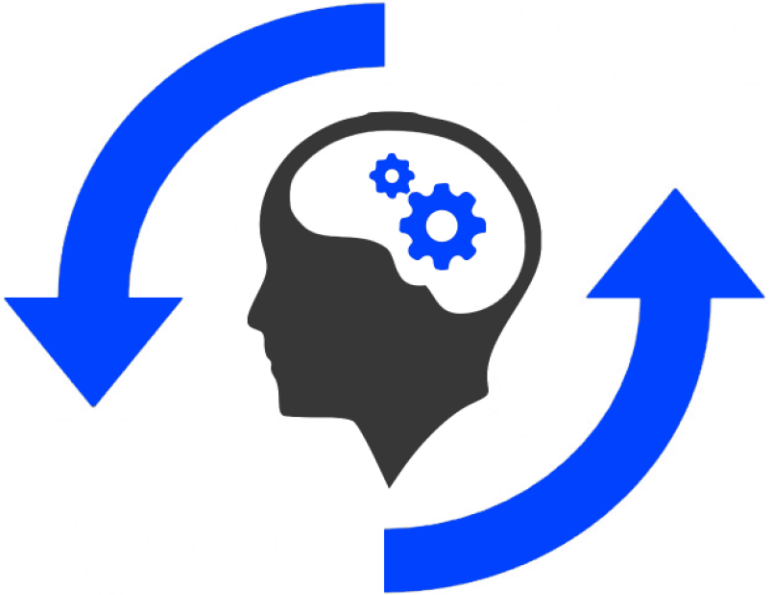


CONSUMER BEHAVIOUR

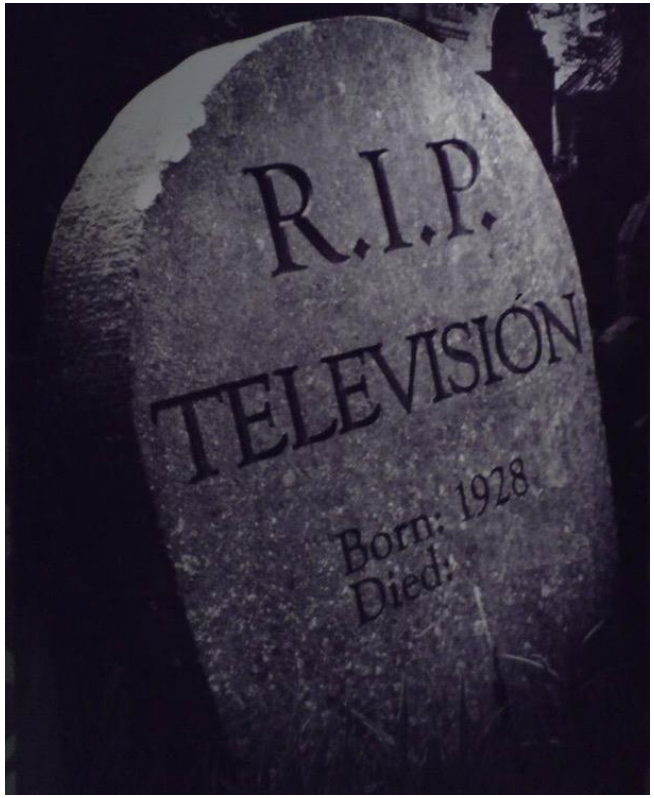
DIGITAL DISRUPTION

THE BUSINESS OF TV



CONSUMER
BEHAVIOUR

CONSUMER BEHAVIOUR



From Linear to On Demand

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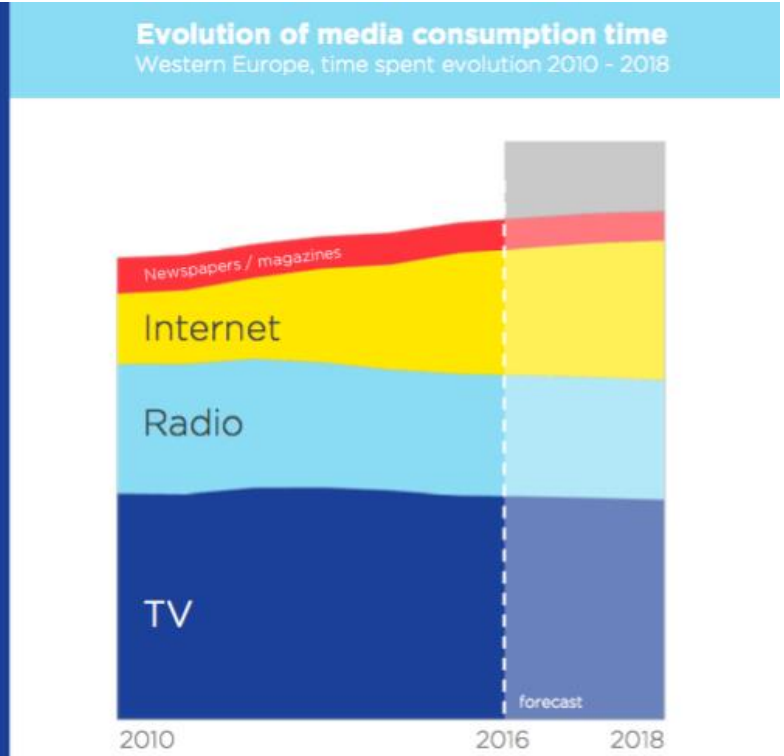
AUDIENCE TRENDS ON MEDIA CONSUMPTION

People are spending more and more time on media



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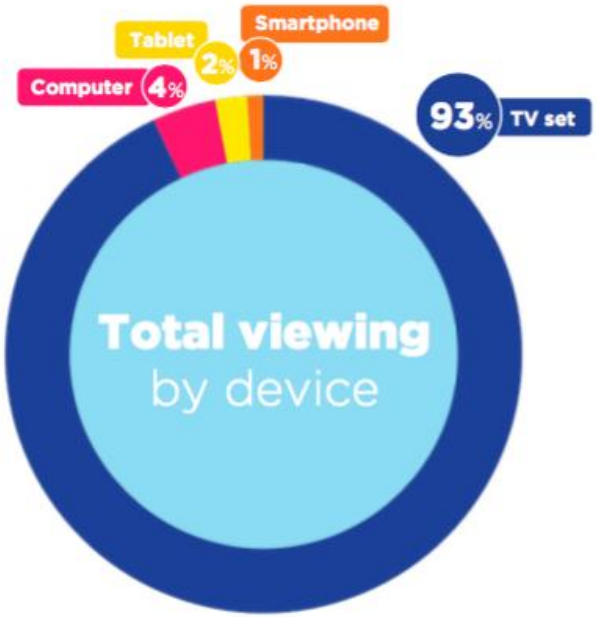
AUDIENCE TRENDS ON MEDIA CONSUMPTION

The huge majority of all viewing is done on a TV set

Total viewing by device
adults aged 16+, United Kingdom, time spent in % by device, Q1 2016



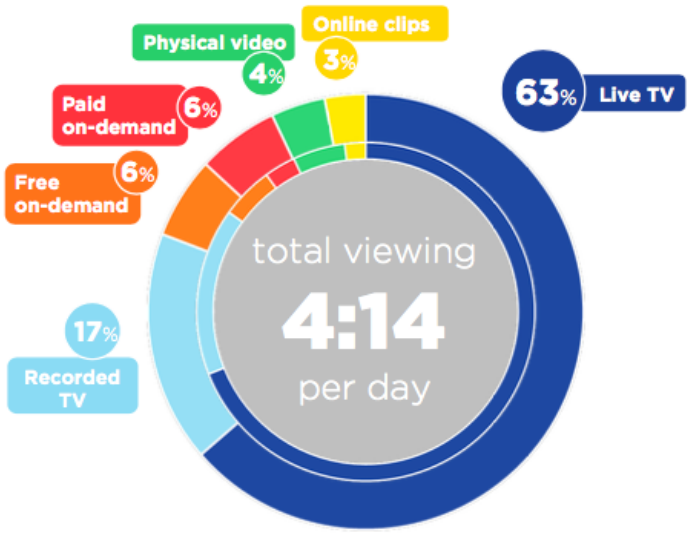
Source: Ofcom Digital Day

AUDIENCE TRENDS ON MEDIA CONSUMPTION

The shift to online TV & video is happening... slowly

Total viewing time by type of content
adults aged 16+, United Kingdom, type in % of total viewing

Inner circle: Q1 2014 / Outer circle: Q1 2016



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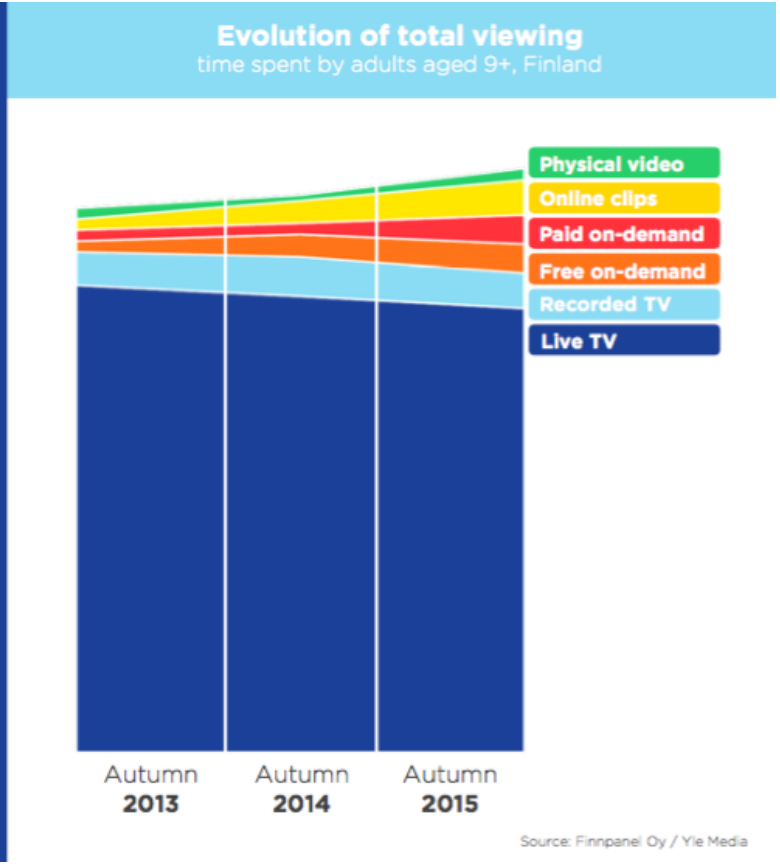
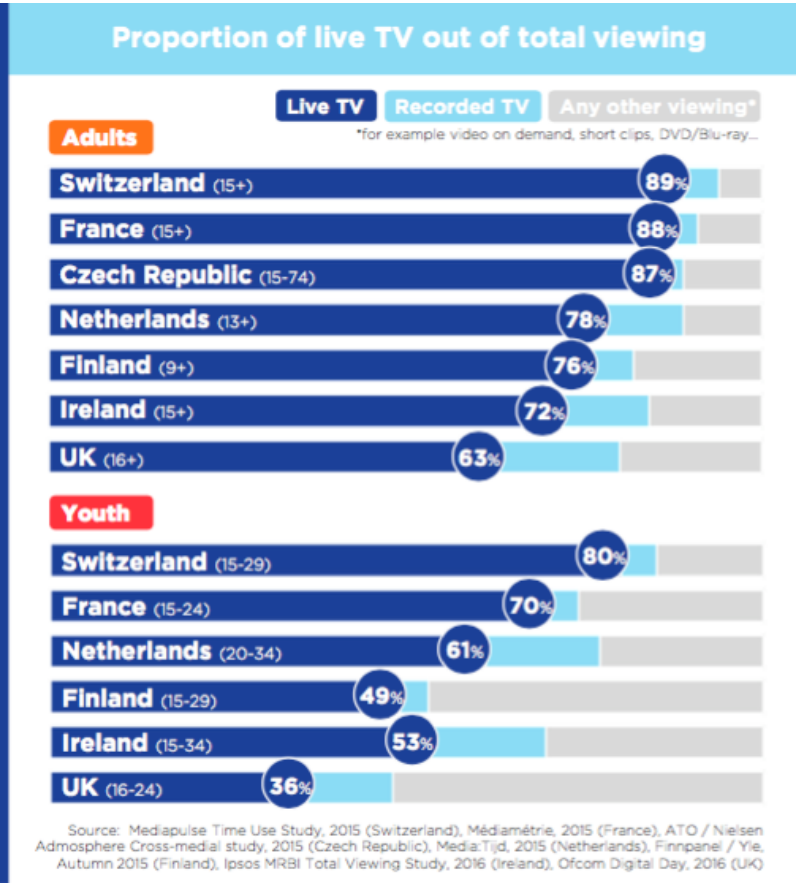
AUDIENCE TRENDS ON MEDIA CONSUMPTION

While total viewing tends to increase, live TV slightly declines

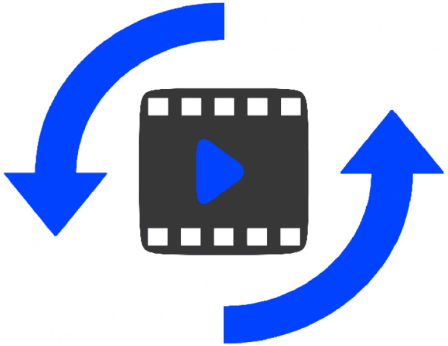


AUDIENCE TRENDS ON MEDIA CONSUMPTION

Live TV is still the dominant type of viewing



THE BUSINESS OF TV



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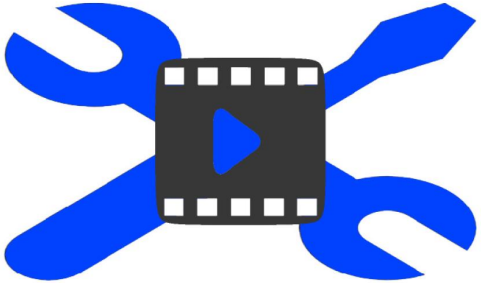
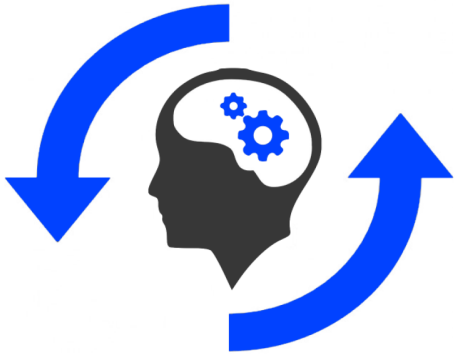


TECHNOLOGY ENHANCEMENT



CONSUMER BEHAVIOUR

DIGITAL DISRUPTION

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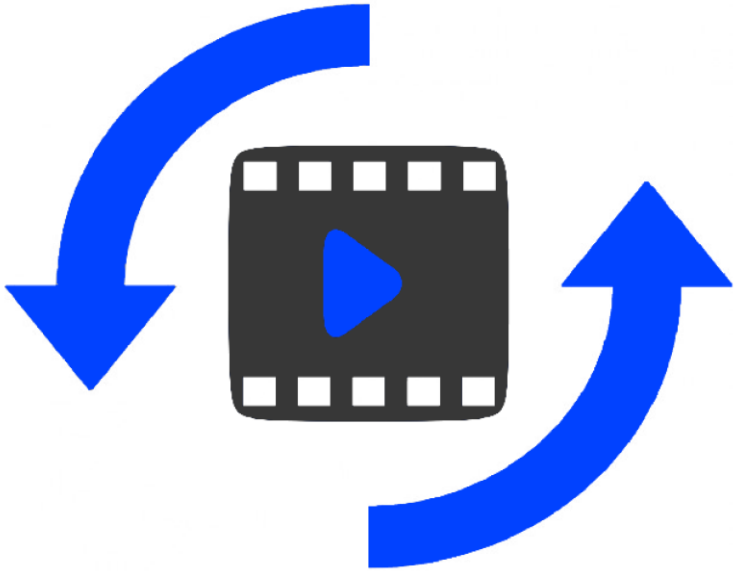

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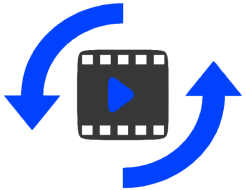


ECONOMICS

Revenues:
EUR 6.1 billion
(global, 2015)

Profit:
EUR 0.11 billion
(global, 2015)

Employees:
3 700
(global, Dec. 2015)

NETFLIX

EUROPEAN FOOTPRINT
(May 2016)

SVoD OFFER

Monthly price:
EUR **7.99** (DE, FR)
EUR **~8.3** (SE, UK)

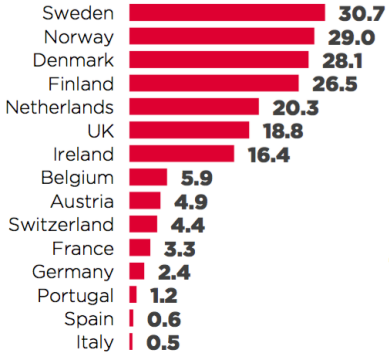
Catalogue size:
~3 800 titles (UK)
~ 2 500 titles (FR, DE, SE)

Local programmes:
10% (UK) / **9%** (DE, FR) / **2%** (SE)

EU movies:
22% (FR) / **18%** (DE)
15% (SE) / **8%** (UK)

EUROPEAN PENETRATION

(% of households, Dec. 2015)



52%
of all EU SVoD subscribers
(2015)

Drama is the new Sports

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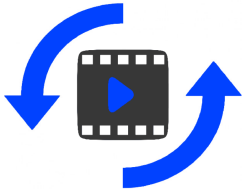
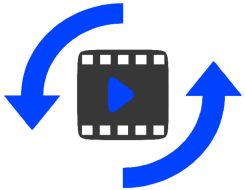
DISTRIBUTION MODELS



DTT is Cost Effective

DISTRIBUTION MODELS



DTT offers New Services

FreeviewPlay

Bringing you live TV and catch up together, in the TV guide

FreeviewHD

With 15 HD channels in vivid natural detail, we've got HD covered

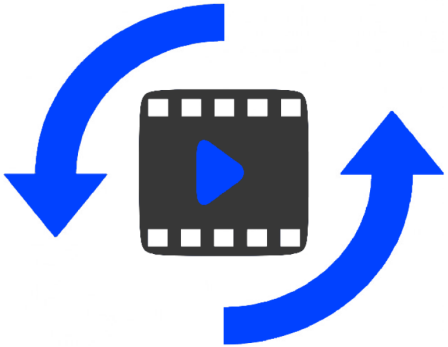
FreeviewHD RECORDER

Pause, record and rewind any show across 70 digital and 15 HD channels

DISTRIBUTION MODELS

DTT is a Business Enabler

THE BUSINESS OF TV



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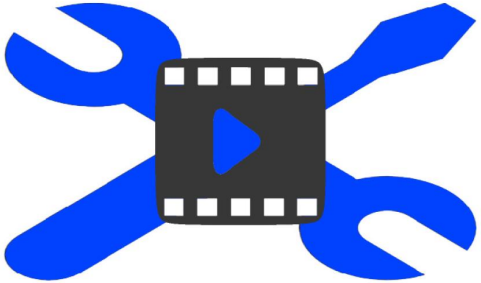

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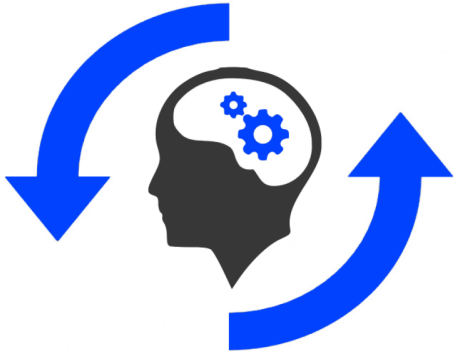


CONSUMER BEHAVIOUR

DTT

as Catalyzer

DTT, CATALYZER FOR LOCAL TV PRODUCTION

1. Linear TV in not dead, the future of TV is not on demand or live, it’s a bit of both
2. Content is king and national/local content is source of job creation
3. Compared to other linear TV distribution means, DTT has a particular and effective role in
   i. promoting Local Content Production and
   ii. providing the Right Content to the Right Audience.

TV MOST TRUSTED MEDIA

WHICH MEDIA DO EUROPEAN CITIZENS TRUST MOST?

RADIO BY FAR THE MOST TRUSTED MEDIUM ACROSS EUROPE

33 countries surveyed in total

20 of **33** trust **RADIO** most

13 of **33** trust **TV** most

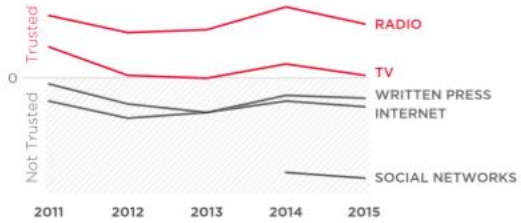
**In Greece, Internet is the most trusted medium*
**In Cyprus, radio and TV are equally most trusted*

BROADCAST MEDIA LEADS THE WAY FOR CITIZENS' TRUST

At EU level, radio and TV top the **Net Trust Index***, with more citizens trusting them than the written press, the Internet, or online social networks

RADIO AND TV REMAIN MOST TRUSTED SOURCES OVER TIME

At EU level broadcast media have maintained positive **Net Trust*** scores over the past 5 years



TRUST IN RADIO AND TV HIGHEST IN NORDICS

The **Net Trust Index*** both for radio and TV is highest in the Nordics and Estonia

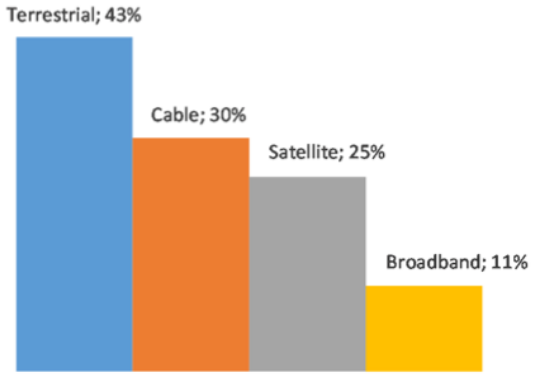
DTT PARTICULARLY IMPORTANT FOR PSM

"Innovative"

"Nationally safe"

"Easy to use"

"Business enabler"



"successful"

"Cost effective"

DTT serves more than 100 million European households with 250 million viewers

THANK YOU !

JEROEN DEPRAETERE
HEAD OF TELEVISION & FUTURE MEDIA

DEPRAETERE@EBU.CH
@JDEPRAETERE
+41 79 4446122

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