

THE DISTRIBUTION OF AUDIOVISUAL SERVICES A EUROPEAN VIEW

September 2018

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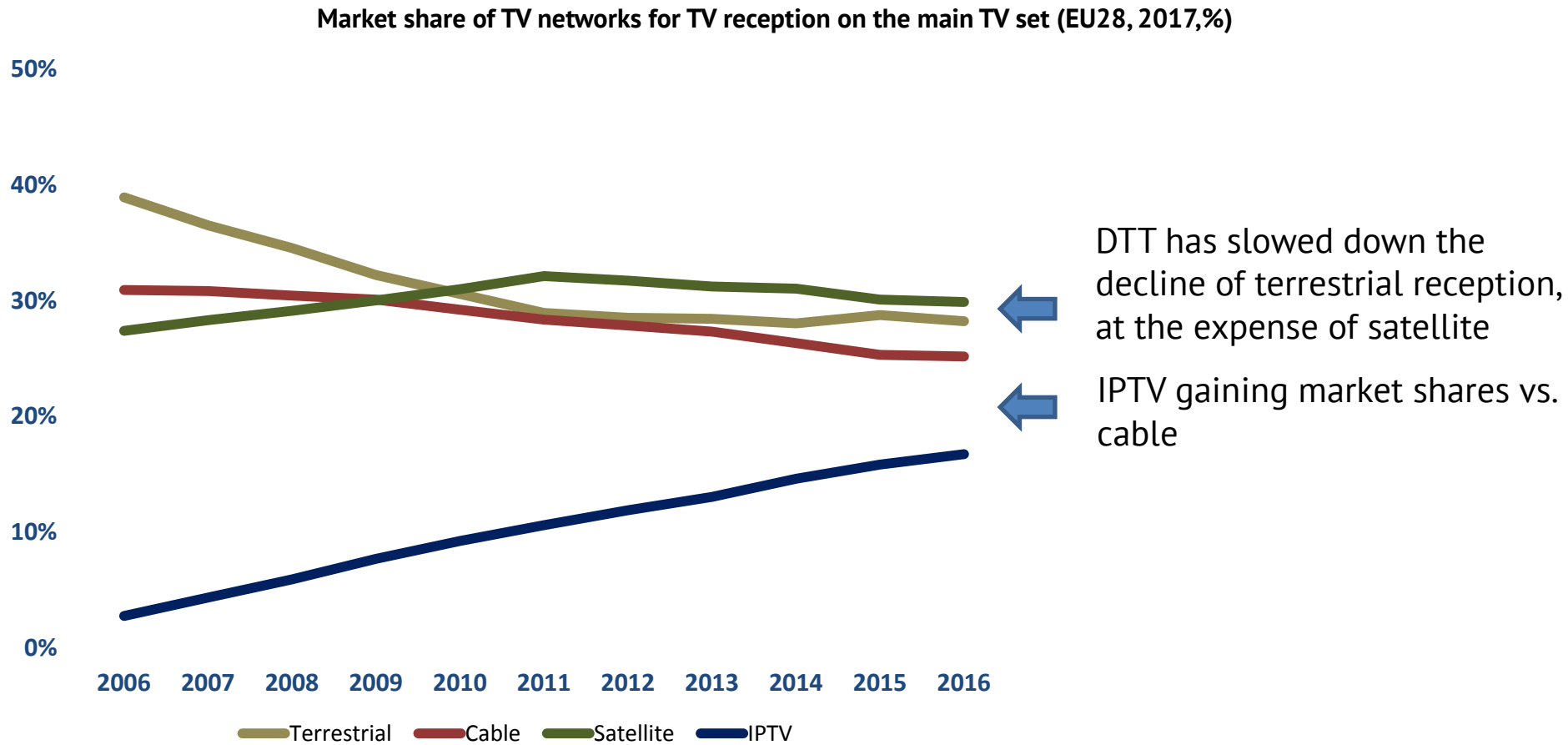
Head of Department for Market Information

- 1. TV RECEPTION: THE RISE OF IPTV**
- 2. WHAT IS (EXACTLY) OTT?**
- 3. AUDIOVISUAL SERVICES CIRCULATE,
MOSTLY WITHIN EU28**

1. TV RECEPTION: THE RISE OF IPTV

TELEVISION RECEPTION IN THE EU

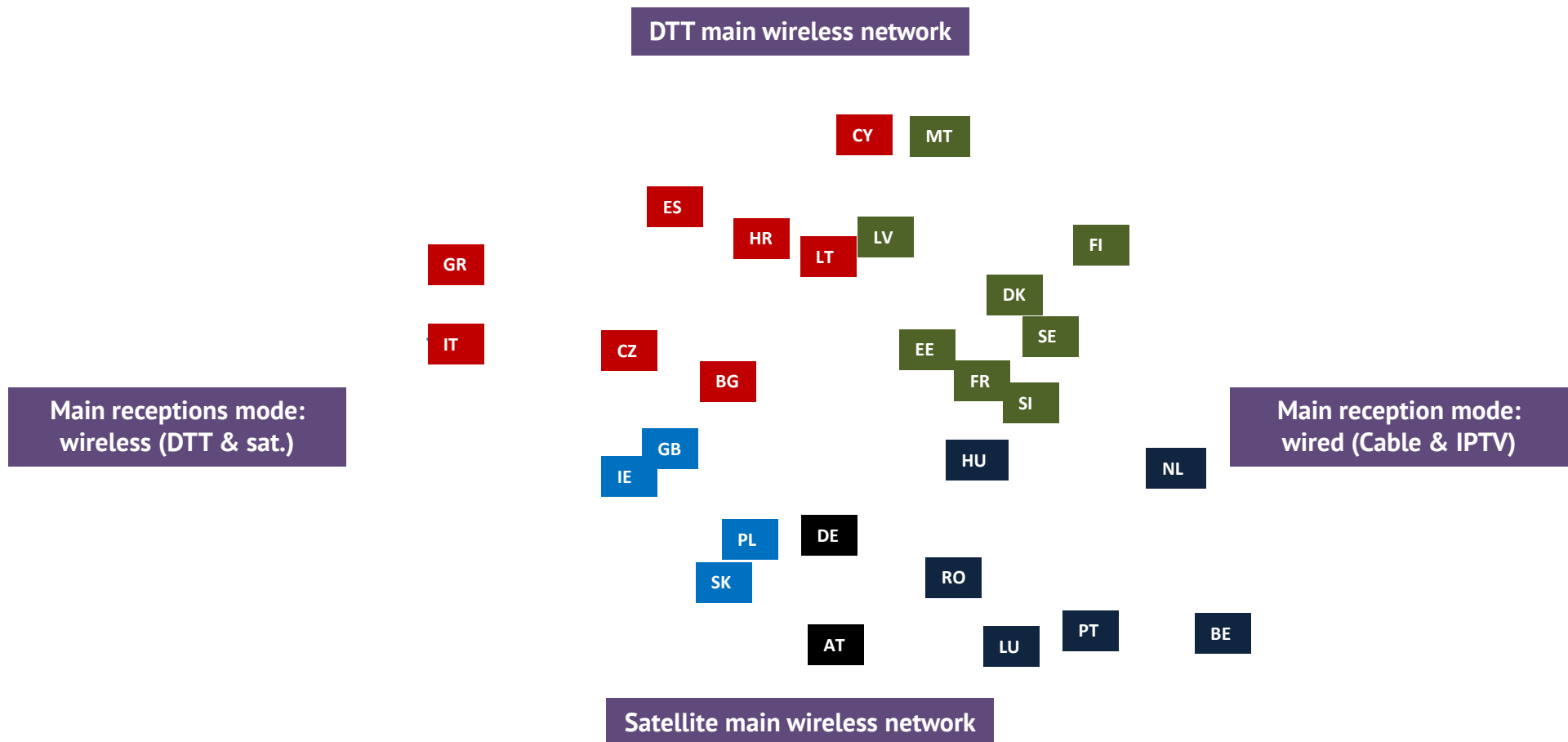
Television remains primarily received through wireless networks (DTT, satellite)



TELEVISION RECEPTION IN THE EU

The TV reception landscape strongly varies between countries

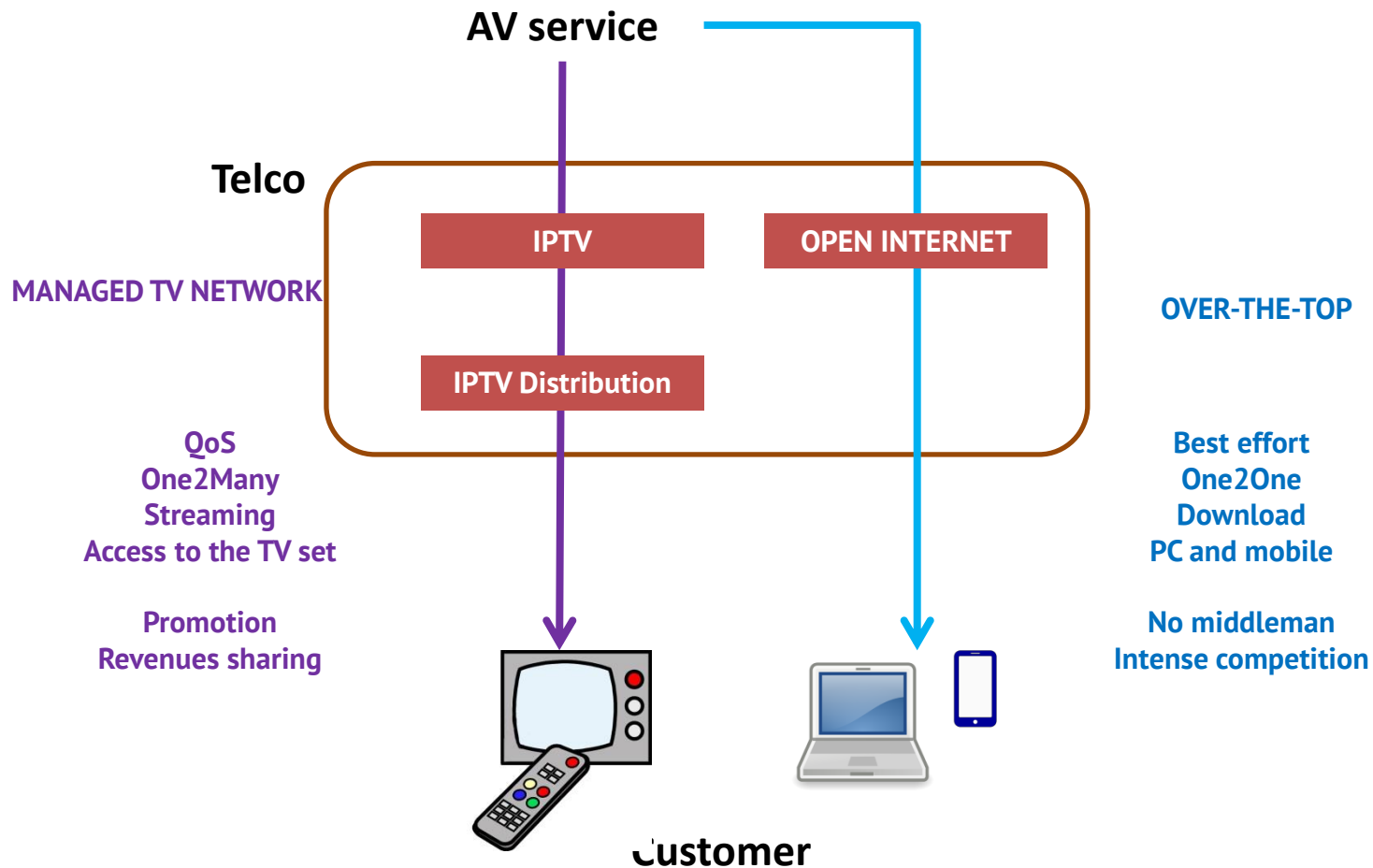
Mapping of EU28 countries by weight of TV networks (2017)



2. WHAT IS (EXACTLY) OTT?

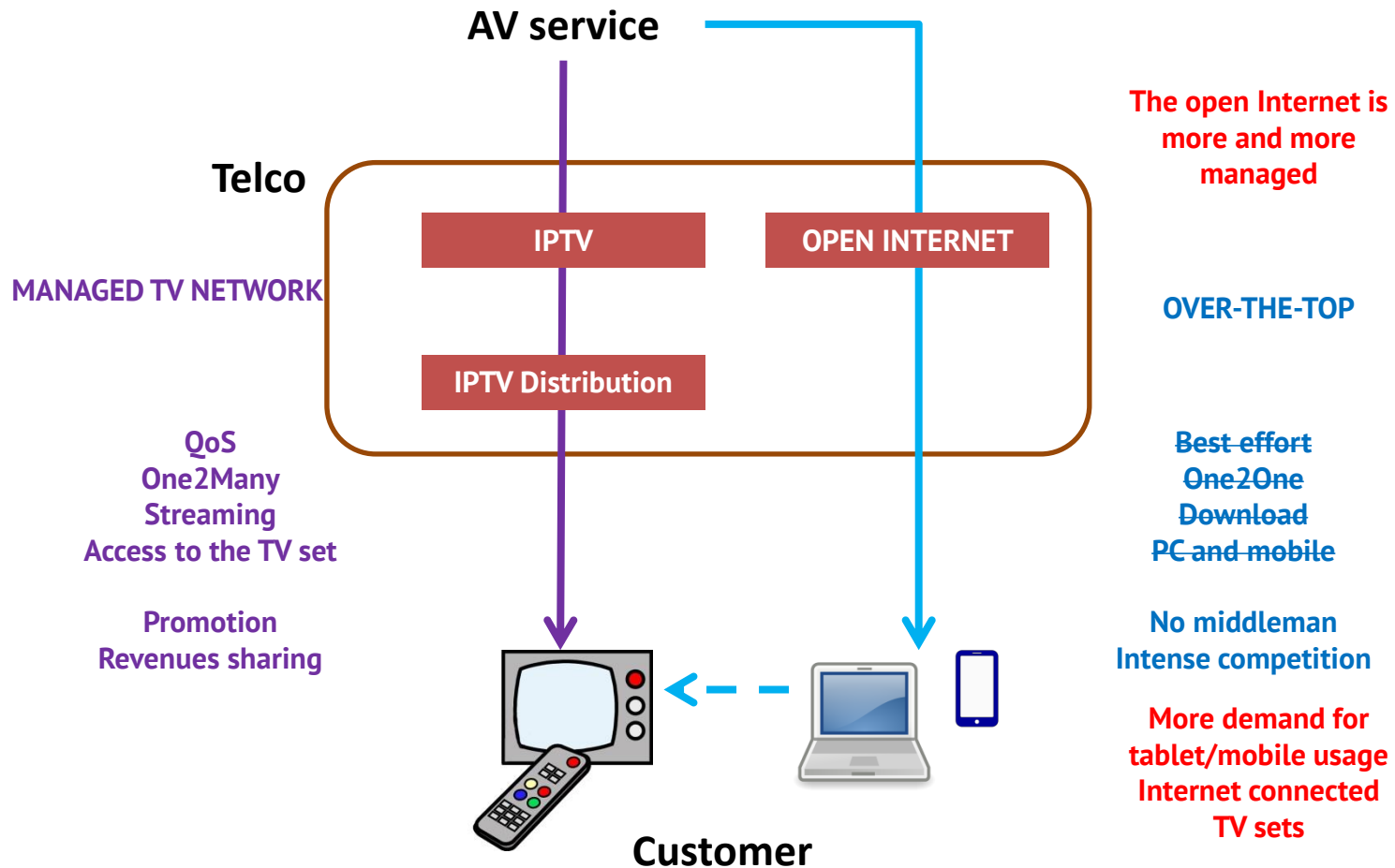
OVER-THE-TOP IS BOTH A TECHNICAL AND A DISTRIBUTION CONCEPT

1. A service which is transmitted over the “open”, “public” internet
2. A service which is directly distributed to the consumers, by-passing the television distributor



TECHNICALLY SPEAKING, OVER-THE-TOP IS EVOLVING FAST

The quality of service is more and more managed
TVs are increasingly directly or indirectly connected
Therefore, going OTT or managed is more and more a distribution decision



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News



BBC predicts all-IP future, says it will evolve into an internet broadcaster



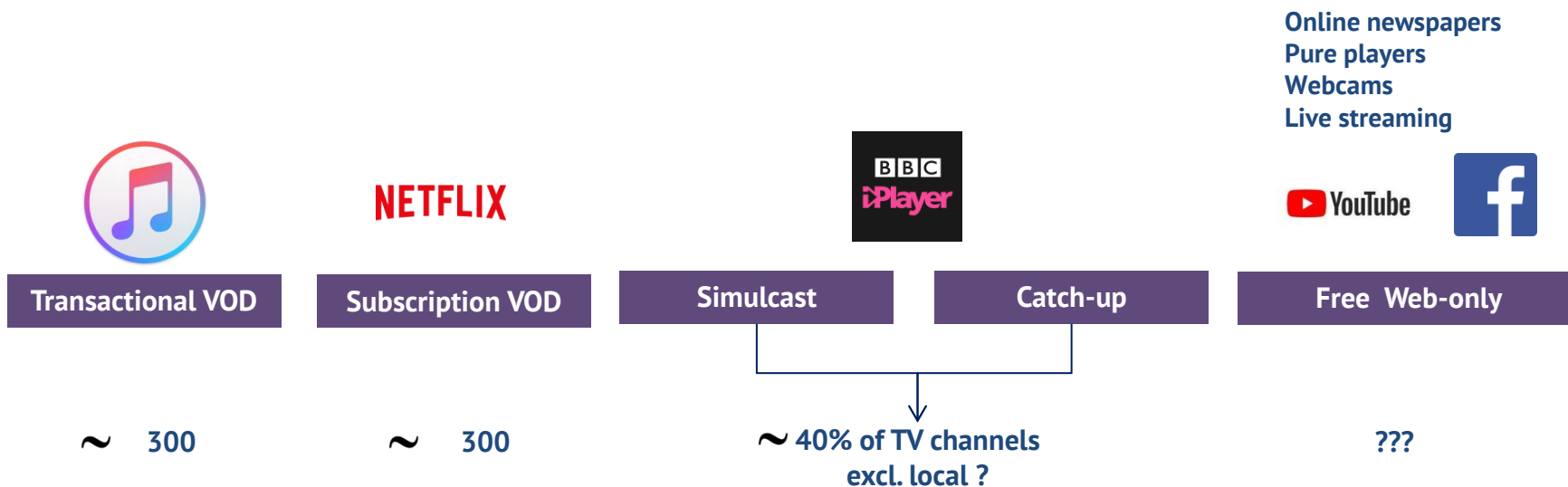
Written by [Andrew McDonald](#) | 11 May 2018 @ 13:06

3. AUDIOVISUAL SERVICES CIRCULATE, MOSTLY WITHIN EU28

AVAILABILITY OF AUDIOVISUAL SERVICES IN EU

LINEAR SERVICES: 4000 INTERNATIONAL & NATIONAL + ABOUT 3500 LOCAL & REGIONAL

ON-DEMAND VIDEO SERVICES: ???



ESTABLISHMENT OF AUDIOVISUAL SERVICES IN EU28

THE NUMBER OF LICENCES DIFFERS FROM THE NUMBER OF SERVICES:

- One licence for Disney Junior (Scandinavia) covering Disney Junior in Swedish, Danish, Finish and Norwegian
- One licence for all national Netflix services

THE VAST MAJORITY OF SERVICES AVAILABLE IN EU28 ARE ESTABLISHED IN EU28:

- ~ 85% of national & international TV channels
- ~ 90% of pay On-Demand services

HOWEVER ABOUT ONE-THIRD OF SERVICES ESTABLISHED IN THE EU28 TARGET ANOTHER COUNTRY, PRIMARILY ANOTHER EU28 COUNTRY:

- ~ About 30% of national & international TV channels established in the EU28 primarily target another country (80% of these target another EU28 country)
- ~ About 34% of pay On-Demand services established in EU28 primarily target another country (85% of these target another EU28 country)