



Television 2020

The Web migration

Market & Data Reports

This report provides a look at the future shape of the TV market, based on a forward-looking analysis that combines

- an in-depth diagnosis of the sector,
- an analysis of the macro-economic trends
- and a set of development scenarios,

with figures for Europe and the United States.

Key questions

- Can we make a distinction between current upheavals and overriding trends in the sector?
- How to measure the issues tied to key innovations: new viewing habits, revolutionised access, changes in TV and video services, a redistribution of sources of financing?
- How will media companies emerge from the crisis?
- Is there a shift towards integrated pan-European conglomerates?
- What are the most likely development scenarios for TV?
 - "My Web Video"
 - "Broadcasting as Usual"
 - "Community TV"
- > Market figures for each of the countries examined (France, Germany, Italy, Spain, the UK, the United States): TV reception modes, Viewing time, Advertising market, Pay-TV market



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5. Key Innovation Factors: Consumption

- 5.1. TV viewership, 2000-2008
 - Individual TV viewing on the rise
 - A 2nd generation of general entertainment channels
- 5.2. Television's role in people's leisure time
 - TV: most time devoted to ICT
 - TV: a small part of households' ICT budget
- 5.3. Time-shifted viewing
 - Audience moving away from live viewing
 - Internet enabling time-shifted viewing
- 5.4. Piracy and free content
- 5.5. Role played by social networks
- 5.6. Consumers as content producers
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6. Key Innovation Factors: Access

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 - DVB-T & DVB-H, Wi-Fi & WiMAX, the IP chain
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 - 6.2.2. Three visions of the digital home
 - The terminal-centric household: PC or TV
 - The user-centric household
 - The network-centric household: online or local
 - 6.2.3. The shift to Open TV
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7. Key Innovation Factors: Services

- 7.1. TV & Video services, 2000-2008
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 - HD DVD: growth outlet?
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 - Pay-TV driving market growth
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 - Internet and advertising
 - Key role of agencies and ad space sellers
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 - Specialty channel packages
 - Conflicts in the value chain
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- 9.1. Initiatives from content providers
 - Must-see vs. syndication
 - TV channels' online strategies
 - Premium video and back catalogue
- 9.2. Other players

Associated documents

- Database & forecasts (Excel): France, Germany, Italy, Spain, the UK, the United States
- Summary (PowerPoint)

BP 4167 - 34092 Montpellier Cedex 5
Tel: +33(0)467 144 444 - Fax: +33(0)467 144 400
info@idate.org - www.idate.org

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To order,
please contact :

Isabel JIMENEZ
i.jimenez@IDATE.org
tel: +33 (0)467 144 404

Project Manager

Gilles FONTAINE
g.fontaine@IDATE.org
tel: +33 467 144 443

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Methodology: a rigorous approach

This report provides development scenarios for the TV and video sector up to 2020, based on **macro-economic scenarios** that integrate hypotheses on the market environment, lifestyle and the social networking, and by combining:

- **analysis of the key development factors:** usage, access, services, financing and market players
- **construction of TV 2020 scenarios:** IDATE shares its view of the expected development trajectory for each of the key issues. Their combination forms the basis of development scenarios for the TV sector as a whole.
- **figures for the benchmark scenario:** the scope of analysis includes developed countries, with figures for the benchmark scenario applying to the United States and Western Europe's five main markets: Germany, Spain, France, Italy and the UK.

The three phases of the TV sector's evolution:

	--- Analog TV ---	----- Digital TV -----	----- Internet TV --->
Usage	All Live Collective On the TV set	Theme channels introduce educate viewers to off-live On Multiple TV sets	Any time & Anywhere Personal TV Shared in my network On any terminal
Access	Terminal = TV Network as technical provider The TV channel is the gatekeeper	Digital managed networks Multichannels providers as gatekeepers between TV channels and viewers	Network gatekeepers bypassed by Internet services and challenged by device managers
Services	Broadcast television	Multichannel television	Catch-up & VOD Enriched TV Video social networking
Funding	TV Channels Public funding TV channels advertising	TV channel subscription TV package subscription	Program advertising Program purchase
Key players	Rightholders Broadcast TV channels	Rightholders Packagers/Network operators	Rightholders Device manufacturers Search engine Social networks

Source: IDATE

From scenario modelling to market figures

IDATE has identified 20 factors, broken down into 5 categories, which will shape the TV sector's evolution. The combination of the expected development path for each factor allows us to establish exclusive scenarios – one of which IDATE has selected as the benchmark scenario, for which figures are provided. The impact and scope of these developments allow us to paint a detailed view of the future state of the television market, and to provide users with a set of benchmark figures, **market data and national forecasts up to 2020**.

Access

1. Managed networks and open networks
2. The digital home and devices

Financing

3. Advertising market
4. Pay-TV
5. Public financing

The players

6. Content providers
7. Telcos
8. Internet companies
9. CE manufacturers
10. Regulators

Usage

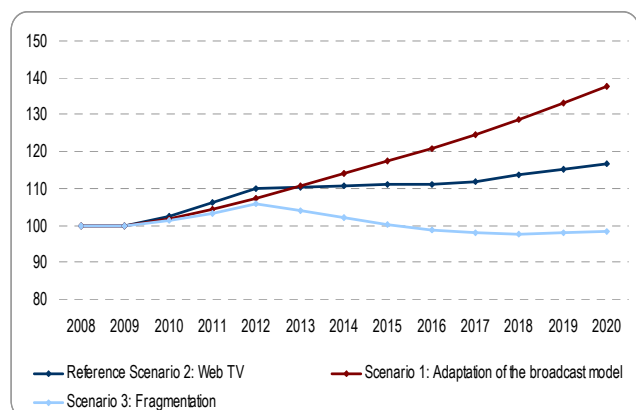
11. TV's role in leisure time
12. Time-shifted viewing
13. Piracy and free content
14. Development of social networks

15. Consumers as content producers

Services

16. Picture quality
17. Services on demand
18. Enhanced TV
19. Mobile TV
20. New TV services' weight in the equation

Total TV & video market according to the three scenarios, 2008-2020 (100 = 2008)



Source: IDATE

