Will Internet Entertainment Replace Linear TV?

Linear TV is still the dominant use case for video!

Nielsen Total Audience Report (U.S.) 3 Q 2018
New Use Cases Drive Video Consumption

- New Video Formats create immersive experience but are much more data rate intensive
- Up to 90% of 5G traffic could be video alone!

- Self-driving cars create huge potential (the “25th hour“)
- Mobile use of video shows significant growth rates
Future of Broadcasting is Hybrid

- Broadcasters have to learn from OTT Players and get more user centric!
- Combination of linear and non-linear content with intuitive usability will be key!
- Appropriate infrastructure is needed to support these goals
Broadcast Distribution is at a Crossroads

“Broadband takes it all”  “5G Broadcast”
Scenario A: „Broadband takes it all“

- Dependence on the network operator
- Unicast: parallel distribution of one and the same content
- Customer pays for „free stream“ expensive broadband tariffs
- Quality is decreasing: Best effort
- Direct customer access is missing
- Unregulated costs
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For example, some vertically integrated platforms have sought to promote their own services (or those that pay them) disproportionately and to pick and choose the content and features the BBC provides which best support their own commercial goals. Many are incentivised to charge the BBC for access to platforms and networks and to charge audiences extra to receive BBC services.

Abstract BBC Distribution Strategy (February 2018)
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Competition problems with Internet distribution

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Scenario B: “5G Broadcast“

• Global technical standard for the first time in TV history
• Combines multicast (one-to-many) and unicast (one-to-one)
• Signal is only one time in the air (shared broadcast)
• Direct customer access SIM-free
• Quality-of-Service
• Nation-wide coverage
Essential Pillars to Create a 5G Broadcast Ecosystem

• Demonstrate the need for 5G Broadcast: Trials (5GXCast etc)

• Regulatory framework to secure
  - implementation of eMBMS features in mobile Devices
  - “interconnection“ of mobile networks and 5G broadcast networks
  - Free-To-Air reception (SIM-free)

• Long-term frequency spectrum availability for broadcasting (> 2030)
5G broadcast will play a central role in securing the long-term future of terrestrial broadcasting and will complement DVB-T2 networks and – in some cases – even substitute them!