

Mobile TV & Video ~ Cutting The Cord

This whitepaper is an extract from:

Mobile & Tablet TV & Video Content, Broadcast & OTT Strategies 2013-2017



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1. Introduction

The Mobile TV & Video industry is fast beginning to realise its potential; an application for smartphones and tablets, which consumers once shied away from due to poor graphics quality or extended loading times, is finally reaching the mainstream of users. This is due to the entrance of smartphones and tablets with superior displays and faster processing power onto the market, and a multi-screen ecosystem forming around consumers' cherished TVs, where viewers can watch their subscription services, Video-on-Demand and online videos across all four screens – TV, laptop/PC, tablet and smartphone. Smartphones and tablets serve two roles with regards to mobile TV, either users directly watching TV on their devices, or use their device as a 'second screen' to enhance their viewing experience by finding out more about the TV programmes or advertisement they are watching. Over-The-Top (OTT) content providers are releasing new applications and services which cater to both of these uses.

Indeed, the television industry is one which has embraced cloud technology and reacted well to consumers' demands to watch what they want, when they want. This has been accelerated by connected TVs, which can access subscription services that consumers may choose to sign up to, bolstering the mobile TV ecosystem. The only requirement now remains to allow users to watch content where they want it at a good quality, via their mobile devices, which is being met in different ways by different companies.

One of the current buzzwords in the Mobile TV industry at present is 'Social TV', as broadcasters note that consumers are choosing to access social networks and chat to friends online whilst their TV is on in the background. With scores of companies, such as Zeebox and GetGlue designing apps to accelerate this trend, not to mention twitter admitting it is 'committed' to the social TV market in 2013, the report will identify what the long-term prospects are for the mobile acting as a second screen, or indeed as a primary screen for the younger demographic.

2. Mobile as the First Screen

The key players within the streamed mobile TV market are either dedicated streaming service providers or broadcasters and content providers who make their content available for catch-up after it was first aired, for example Netflix and Sky. Their services are often accessed through an app or web browser and most of the time require users to have a Wi-Fi connection to ensure they are not subjected to heavy charges for the amount of data used to stream content.

The app stores have also been able to establish themselves as VOD services by negotiating rights to sell access to TV and video content. Users are able to either buy or rent movies and TV shows via app stores without a subscription or the need to install a separate app, which some users may find appealing.

Figure 1: Sky Sports on the iPad



Source: *The Guardian*¹

3. Mobile as the Second Screen

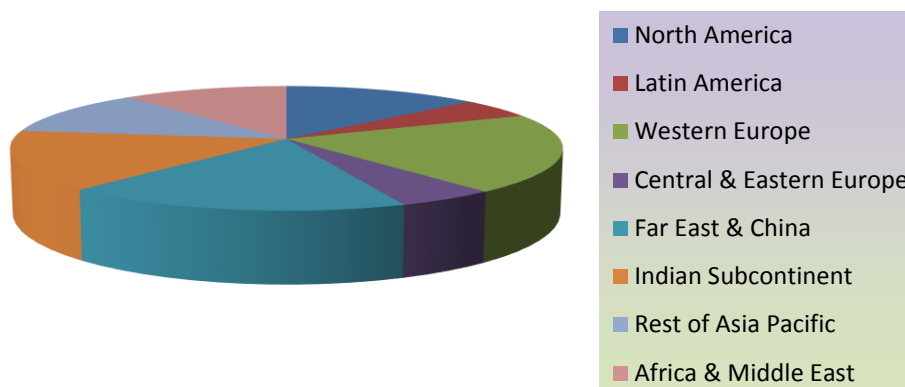
Consumers choose to use their smartphone or tablet for social purposes for all manner of reasons whilst a show is on. They may be watching alone, or they may want to communicate with a group of people they are not with, such as a group of sports fans; or they may be interested to find out what their friends think of the show. This has led to mobile being coined the 'second screen' with regards to TV, as smartphone and tablet users enhance their TV viewing experience by using their phone at the same time. Mobile is most often used in this way in the home, where they are able to view shows on their TV.

4. Streamed Mobile TV & Video Users

The mobile TV and video industry is poised to grow over the forecast period across all regions. This is as tablet penetration grows, particularly in developed regions, and in developing regions featurephone owners begin to own smartphones.

Android devices are typically popular in developing regions as they are available at a variety of price points, so one factor which will drive the increase in the number of viewers will be the distribution of such devices with the YouTube app preinstalled on them. Additionally smartphones typically have a larger and better display, with faster processing powers, making it an ideal device to watch TV and video on.

¹ <http://www.guardian.co.uk/media/2010/may/28/sky-sports-ipad-app>

Figure 2: Total Number of Streamed Mobile TV and Video Viewers Split by 8 Key Regions 2017


Source: Juniper Research

Order the Full Report

Mobile & Tablet TV & Video: Content, Broadcast & OTT Strategies 2013-2017

The Research

- **This 7th edition report** is a **comprehensive analysis** of the latest developments in the mobile TV and video sector and addresses how the environment is evolving in terms of market drivers and the key hurdles and challenges facing OTT (Over-The-Top) players, content providers, network operators and broadcasters.
- **Learn from expert analysis and strategic recommendations** supported by interviews with key players in the ecosystem including Applicaster, AT&T, Dyle, Shazam, Siano, Sling Media, VEVO, Zeebox.
- Available in **pdf** and **Excel** format

What's New in this Edition?

- Country level data for USA, Canada, UK, Germany and France is available in the **Interactive Forecast Excel**.
- A **Summary Forecast Chapter** conveniently provides the reader with top-line figures to establish the total addressable market.
- **Key forecasts** include mobile TV and video revenues for both streaming subscription services and pay-per-title services, the number of viewers and the proportion of these viewers which pay for mobile TV and video services, and the size of the market for advertising in mobile TV and video.
- **Updated Forecasts Split by 8 Key Regions**, and **Device Type** (Smartphone, Tablets and Featurephones)

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