

Understanding the Digital World

Television & Over-The-Top



Future TV: 2025

The new golden age of personal media

M14206MRA – July 2014

- This report is part of our "Television & Over-The-Top" series, which in 2014 includes:
- an Excel database, updated bi-annually
 - a state of the art report in PowerPoint, updated bi-annually
 - four in-depth reports in Word, with a summary in PowerPoint
 - preferred access to our Media experts

Author: Gilles FONTAINE, Deputy CEO



Gilles Fontaine is IDATE's Deputy CEO and head of the Media and Digital Content business unit. Prior to joining IDATE, and after a stint with the Ministry of Culture and the French radio broadcasting company SOFIRAD, Gilles worked for the national deposit and consignment office, *La Caisse des Dépôts et Consignations*, monitoring the investments of a large number of media and multimedia companies. Gilles has also been involved in business development for thematic TV channels.

Mr Fontaine holds a degree from French business school, HEC (*Ecole des Hautes Etudes Commerciales*, 1983) and from the *Institut MultiMedias* (1984).

g.fontaine@idate.org

About IDATE and the DigiWorld Institute

IDATE's teams of specialists have earned us a global reputation for reliable tracking and analysis of telecom, Internet and media markets since 1977.

Now, with the support of our members, which include over 40 of the digital economy's most influential players, the newly rebranded DigiWorld Institute has entered a new era, focusing our development around three main areas of activity:

- **IDATE Research**, a catalogue of publications
- **IDATE Consulting**, bespoke analysis and consulting solutions
- **DigiWorld Institute**, a digital economy think tank.



For more information about us and our reports, contact:

Isabel Jimenez

Tel: +33 (0)467 144 404 - Fax: +33 (0)467 144 400 - ijimenez@idate.org

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2. Methodology & definitions

2.1. IDATE's general methodology

The approach adopted by the IDATE team of analysts and consultants is based on the combination of several methods:

- Field research and validation of field research data;
- Conventional tools used in industry and market analysis: segmentation, competition analysis, strategic strengths, modelling and assessment and forecasts, amongst others;
- Expert analysis of field specialists and their professional network partners.

More specifically, IDATE avails of the following human resources and tools:

1/ A multidisciplinary team of full-time consultants, specialised by business sector

IDATE analyses are performed primarily by our in-house consultants, and very occasionally by freelance market analysts. This approach capitalises on our pool of expertise through teamwork, and the constant sharing of knowledge, ideas, contacts, viewpoints and key data. Each report is drafted by a team of specialists under the direct supervision of senior consultants who are recognised experts in their field.

2/ Primary and secondary research

IDATE reports and databases are based on primary data obtained from first-hand interviews with the sector's decision makers and on secondary data assembled from public sources and external databases.

3/ An integrated information centre sustained by a number of tools and proprietary databases

Over the course of 30 years, IDATE has developed proprietary work methods, data structures and databases that trace the history of major developments in the sectors under study.

- **Companies:** The IDATE in-house data service tracks the latest news and events concerning the leading telecom, Internet and media industry companies around the globe. Innovative firms and start-ups are monitored by the market experts in the different 'Practices'.
- **Markets:** IDATE databases are developed using rigorous methods to process major economic indicators (GDP, investment, exchange rates and demographics) and relate them to influential sectoral and national factors such as CAPEX and national market dynamics).
- **Technologies:** IDATE has a practice-based organisation structure which enables us to track innovation efficiently. IDATE engineers ensure an in-depth understanding of the changing shapes of products and services and of the latest innovations in the marketplace.

4/ Contents of published reports

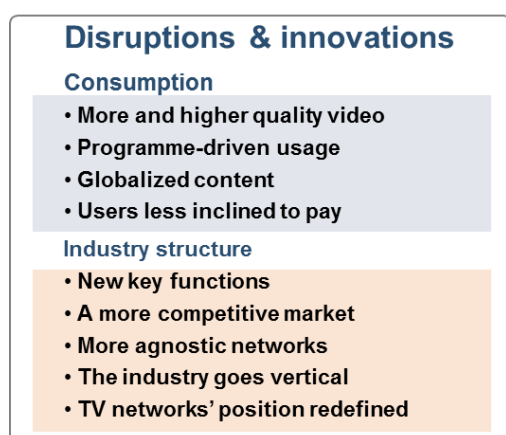
Each IDATE market report details the structures and issues at play in the market under study, the driving forces (technologies, regulation, and consumption) and the players involved. Particular emphasis is placed on market assessments and forecasts, which are developed within the framework of a core scenario. Every market report features a clear and concise presentation illustrated with tables and graphs of key market data and trends.

The drafting process of a market report is based on the following steps:

- analysis of the information available in the in-house databases, and review of analyses performed in the recent past;
- based on a preliminary segmentation and assessment of the market, and as part of an validated interview guide, analysts conduct interviews that enable them to validate working hypotheses;
- a market model is then developed, to enable testing of the hypotheses which impact market development, and the model is validated after a new round of interviews;
- and, finally, report conclusions are debated within the team responsible for the project and with expert consultants from the various fields involved;
- proofreading and editing/revision processes, prior to the editing of the final version of the report which is delivered to the client.

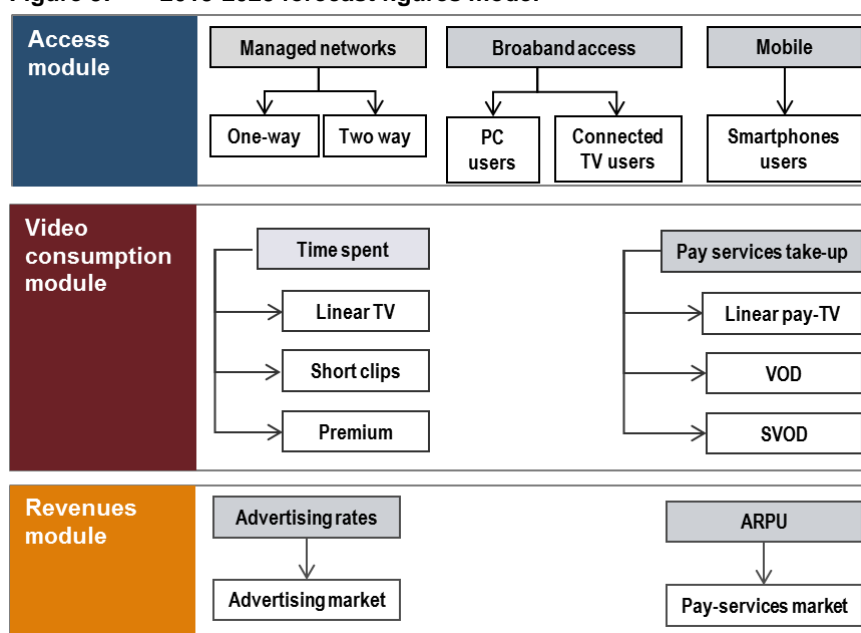
2.2. Methodology specific to this report

- A detailed analysis of the core trends shaping the video sector



- IDATE scenarios for the video sector and market figures for 2013 to 2025.
- Model structure:
 - Countries analysed: Germany, the United States, Spain, France, Italy, Japan, the UK
 - Regions analysed: Europe, world

Figure 3: 2013-2025 forecast figures model



Source: IDATE, *Future TV 2025*, July 2014