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UNIVERSITY of
BUDAPEST

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Market potential of mobile television

Agnes Urban

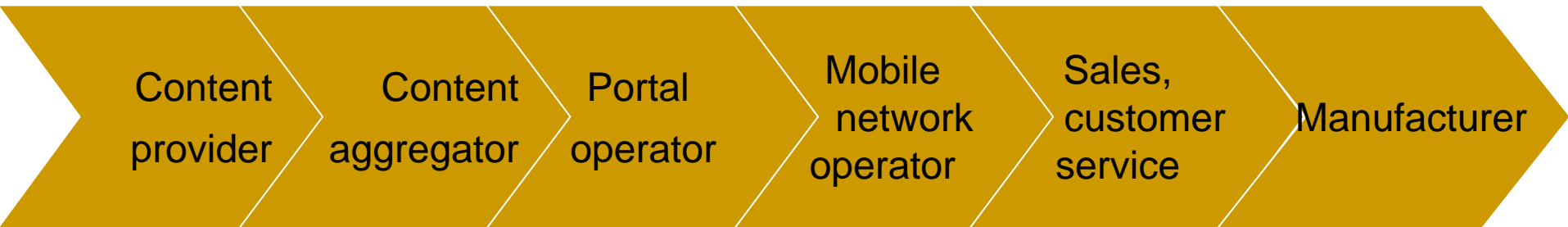
Technologies of mobile television

- on mobile networks (e.g. 3G)
 - point-to-point technology
 - personalized services
 - high capacity is required
- on broadcasting networks (e.g. DVB-H)
 - point-multipoint technology
 - less personalized
 - many channels

Business models

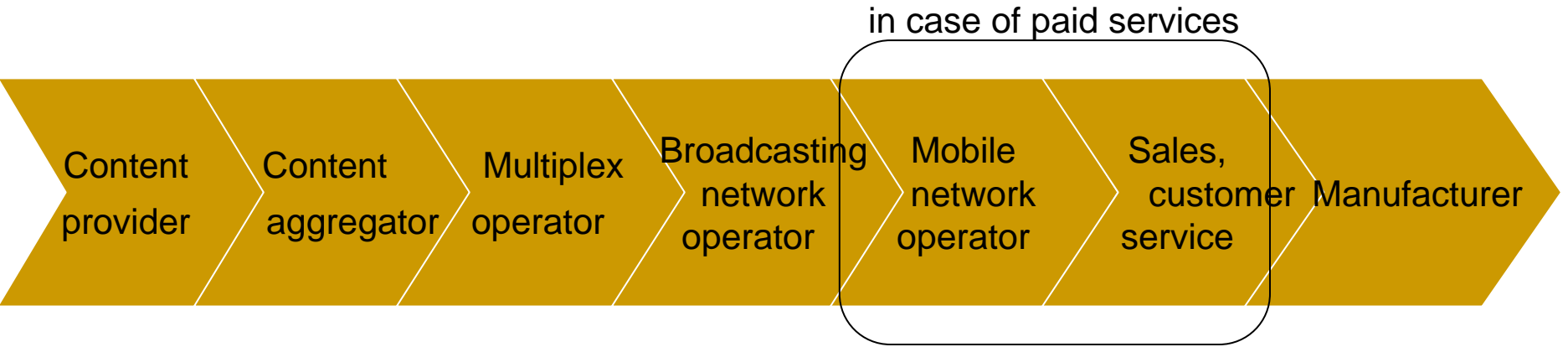
- different supply chains for the different technologies
- high degree of vertical integration
- problem of revenue sharing
- high level of uncertainty concerning the consumers' demand

Supply chain of mobile television services offered on mobile networks (3G)



- television channels
 - producers
 - film studios
- television channels
 - mobile operators
 - other content aggregators
- television channels
 - mobile operators
- mobile operators
- mobile operators
- mobile phone manufacturers

Supply chain of mobile television services offered on broadcasting networks (DVB-H)



- television channels
- producers
- movie studios

- television channels
- mobile operators
- other content aggregators
 - broadcasting company
 - multiplex operator

- multiplex operator

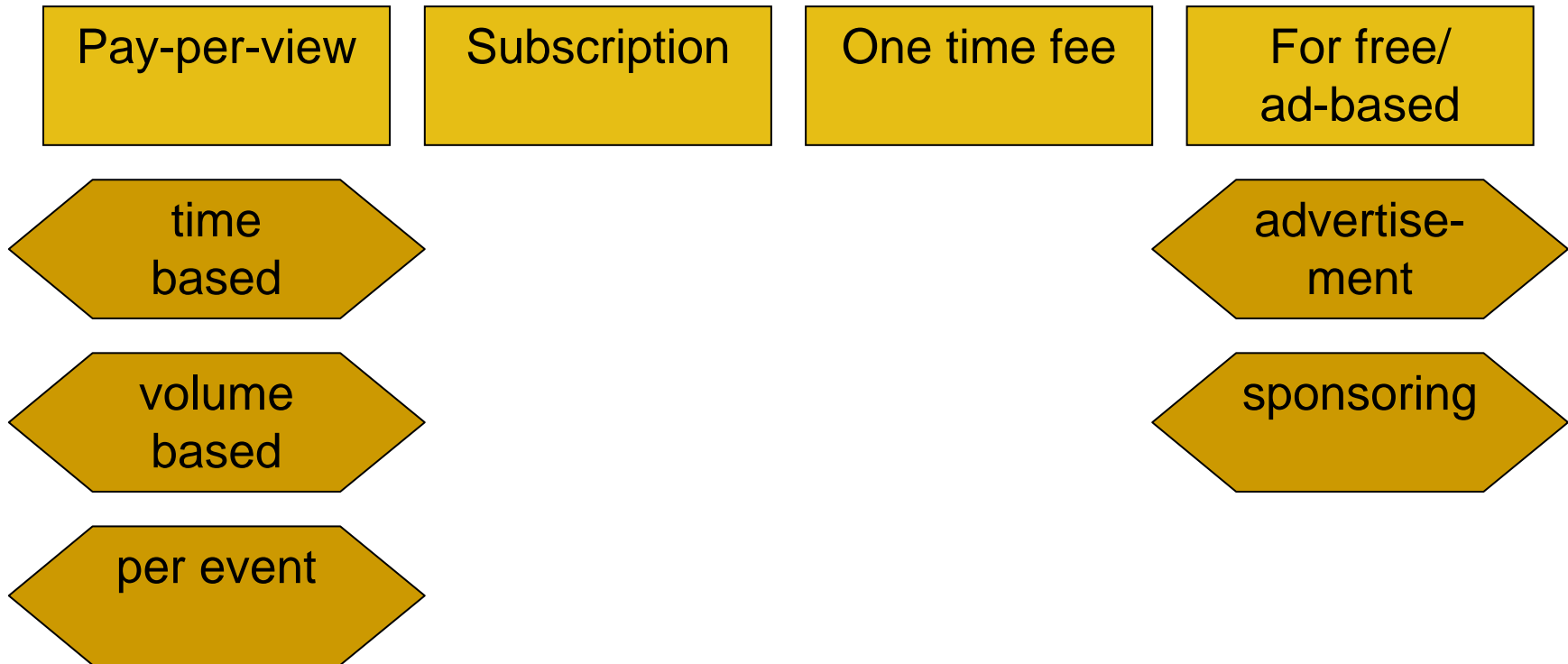
- broadcasting company

- mobile operator (only for feedback)

- mobile operators

- mobile phone manufacturers
- consumer electronics manufacturers

Pricing models of mobile television

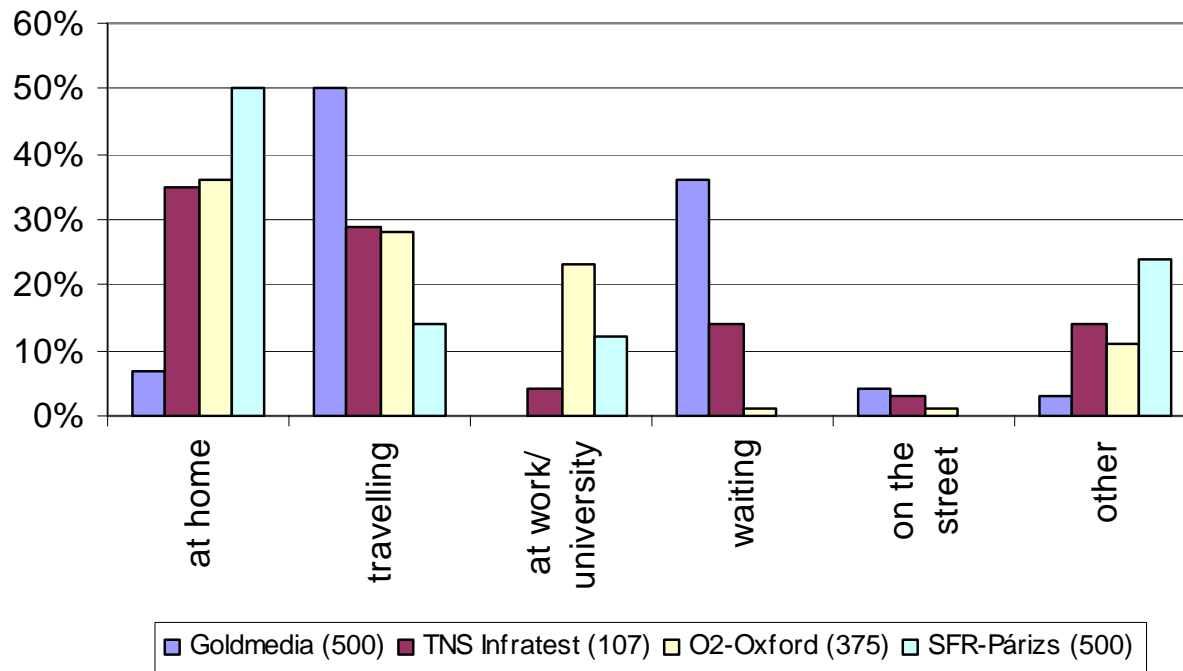


Source: Trefzger (2006)

Questions of mobile TV demand

- mobile + tv = mobile tv?
- ways of watching mobile tv
 - searching for content?
 - killing time?
- new genres and programmes?
- new peak times?
- pay willingness?

Viewing situations



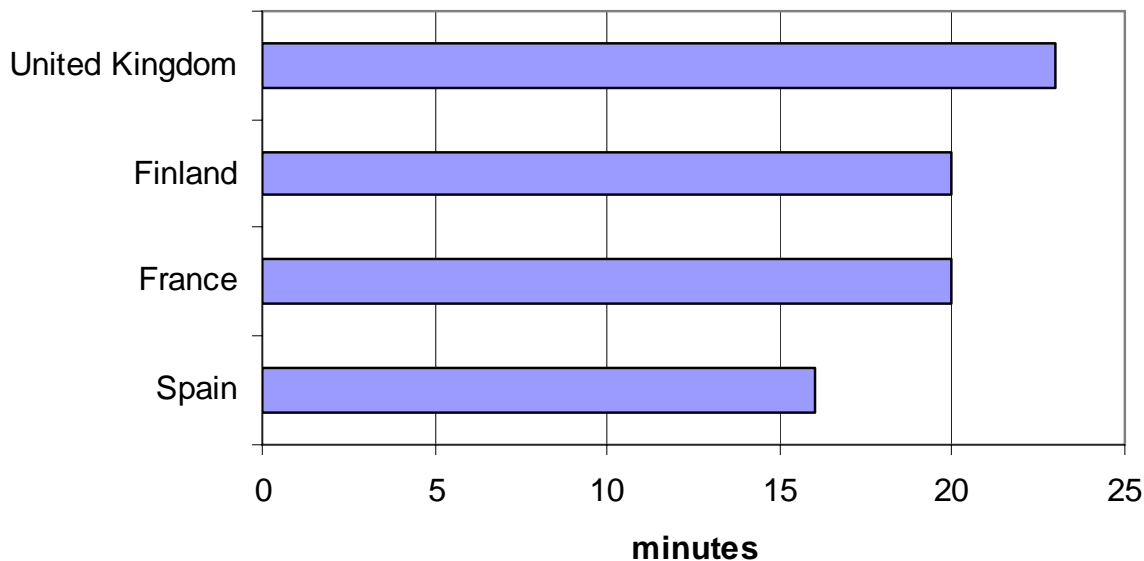
Two main consumer groups:

1. Killing time: while commuting, waiting for something

2. Individualisation/
need for private content: at home

Source: Goldmedia, TNS Infratest, O2-Oxford 2006. March, SFR-Paris 2006. March, Nokia-Madrid 2006. February

Average daily viewing of mobile television



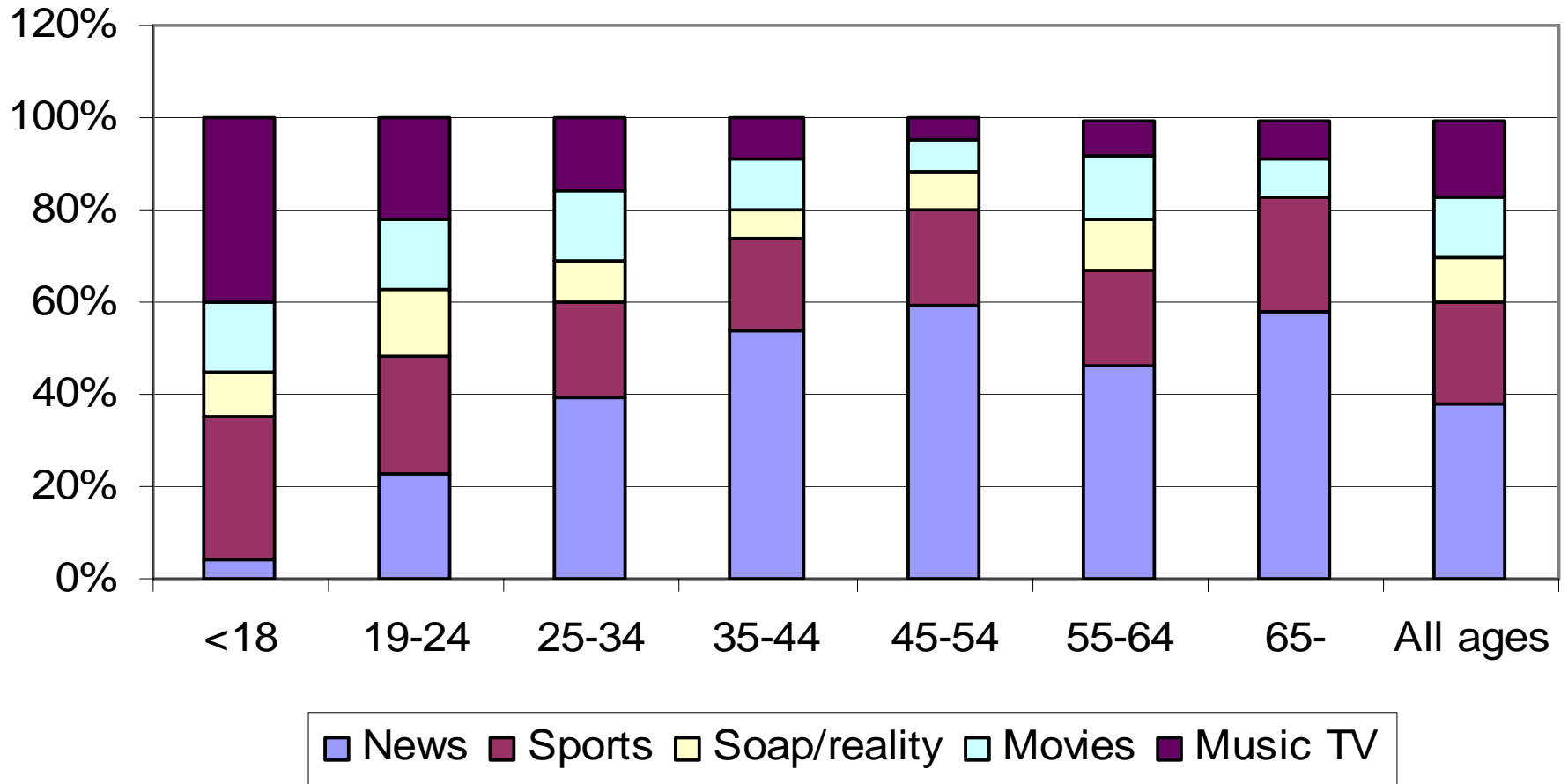
average daily viewing time:
16-23 minutes

average daily viewing of a
certain program: less than
5 minutes

Source: <http://www.dvb-h.org>
Spain-Madrid/Barcelona 2005,
France 2005/2006,
Finland 2005,
UK-Oxford 2005/2006

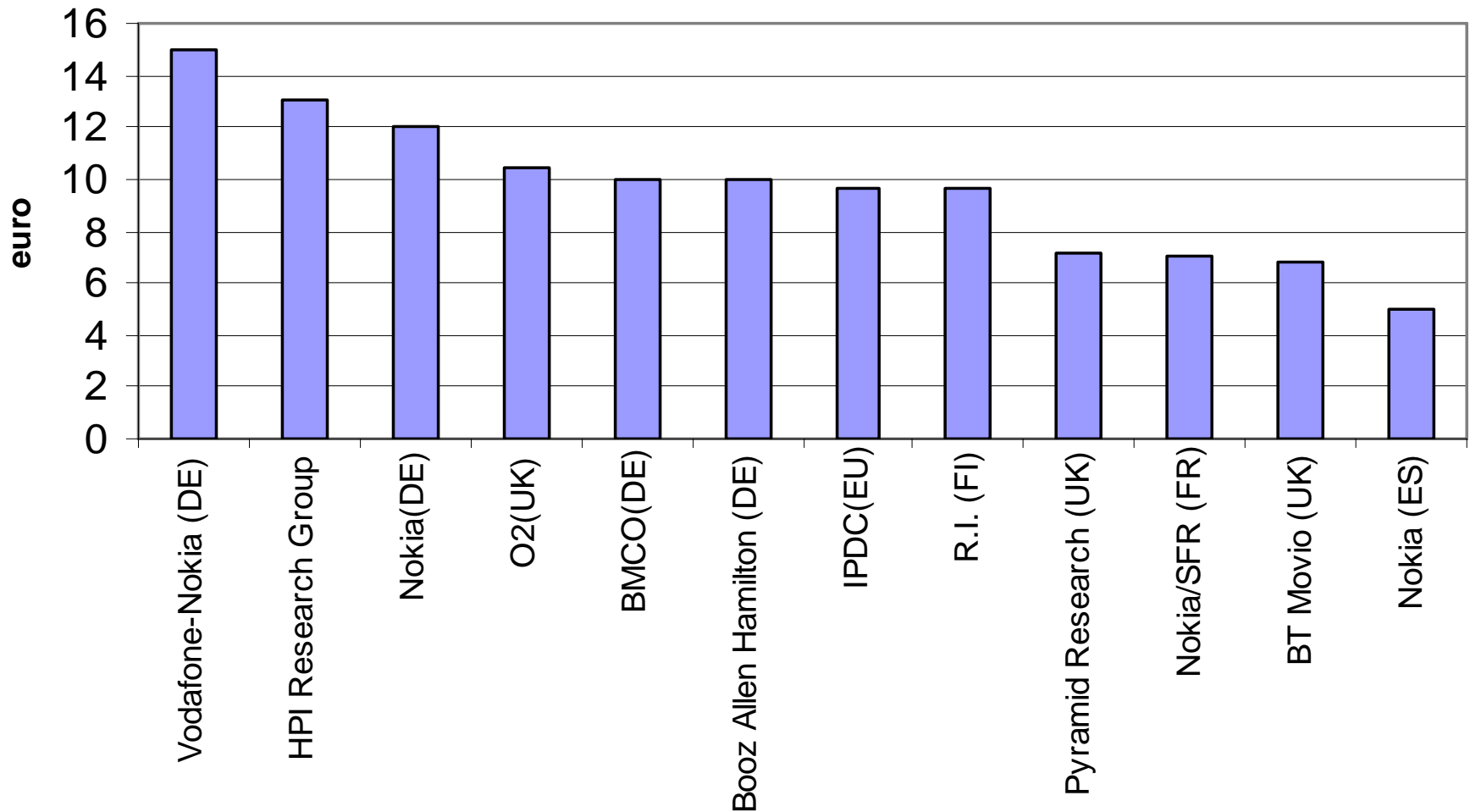
Viewing time is short due to the
preferred viewing situations

Content: traditional television programmes on mobile tv (according to age groups)



Source: A.T. Kearney - University of Cambridge (2005)

Pay willingness



Mobile Rich Media services

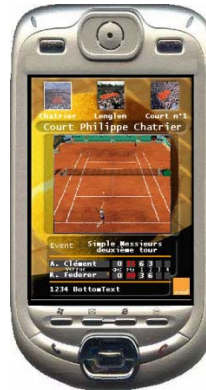
Ciné Pocket



Symphonie



Roland Garros



Orange World Video Portal



Orange Music Cast



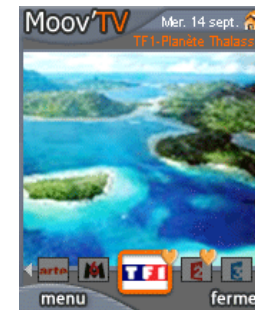
Ligue1



Star Wars



Orange World TV



Orange remote

New ways of media consumption

- more choice, clearer preferences
- free time is the bottleneck – time is more and more valuable
- more individual consumption
- *prosumer* (producer + consumer) attitude, importance of UGC
- mixture of personal and mass communications (peer-to-peer, P2P)
- diffusion of Web 2.0 services – Web 2.0 on mobile platform?

Conclusions

- Results of the pilot projects are not really positive
- New challenge: finding the killer application for mobile television
- Current trends in media consumption can favour to the mobile TV (individualization, limited free time)
- Can mobile TV has a future if mobile internet diffused? (UGC made by mobile devices can have more potential, than the one-way broadcasted content)

Thank you for your attention!

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