



Online Video comes of Age

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Online video?





Sky Player - Sky TV online
 Movies, sports and TV shows on demand, plus live TV channels
 Watch Sky TV where and when you want

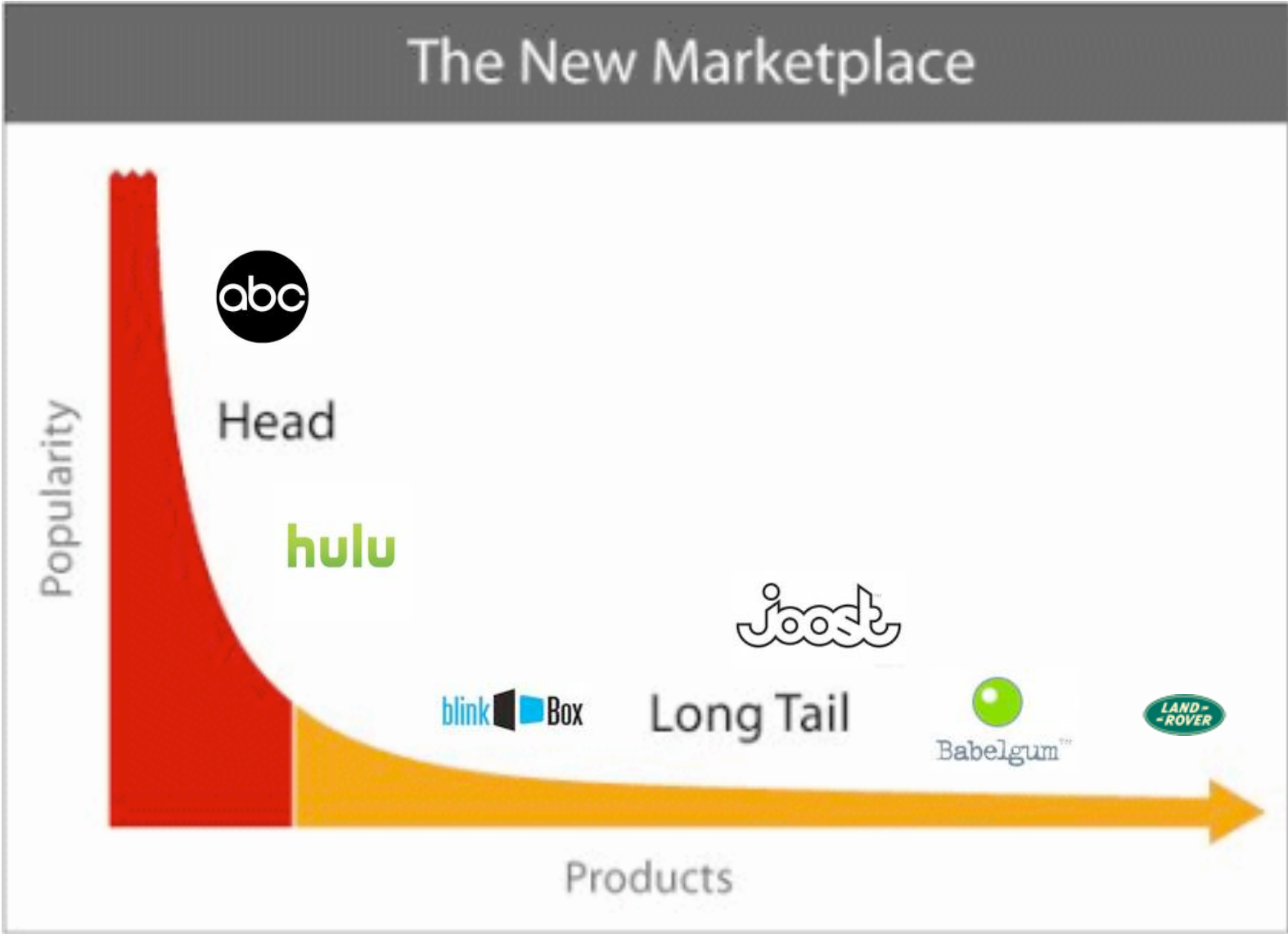


The market today



Defining the market

- Aggregation – professional
- Aggregation – UGC/amateur
- Social media
- Video search
- Streaming TV channels
- Variations of the above



Why now?

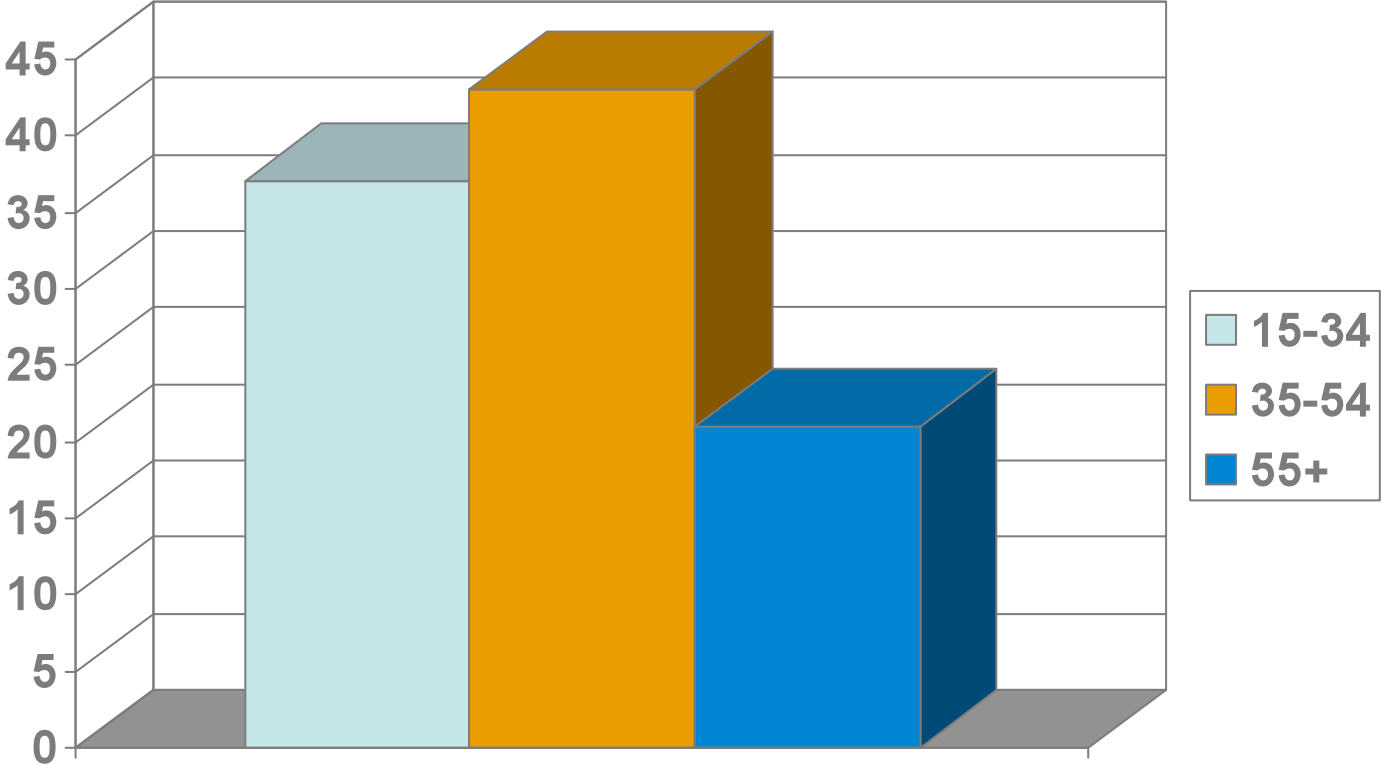
- Better broadband
- To increase reach
- Capture the 'net generation'
- Advertising moving online
- Combat piracy
- Test, test, and test some more

BBC iPlayer – proving demand

- 21 million requests for streams and downloads in April
- Average daily requests in April reached 700,000
- Also available via iPhone, iPod Touch, Nintendo Wii, Nokia



iPlayer users – counter-intuitive?



Online video – competencies

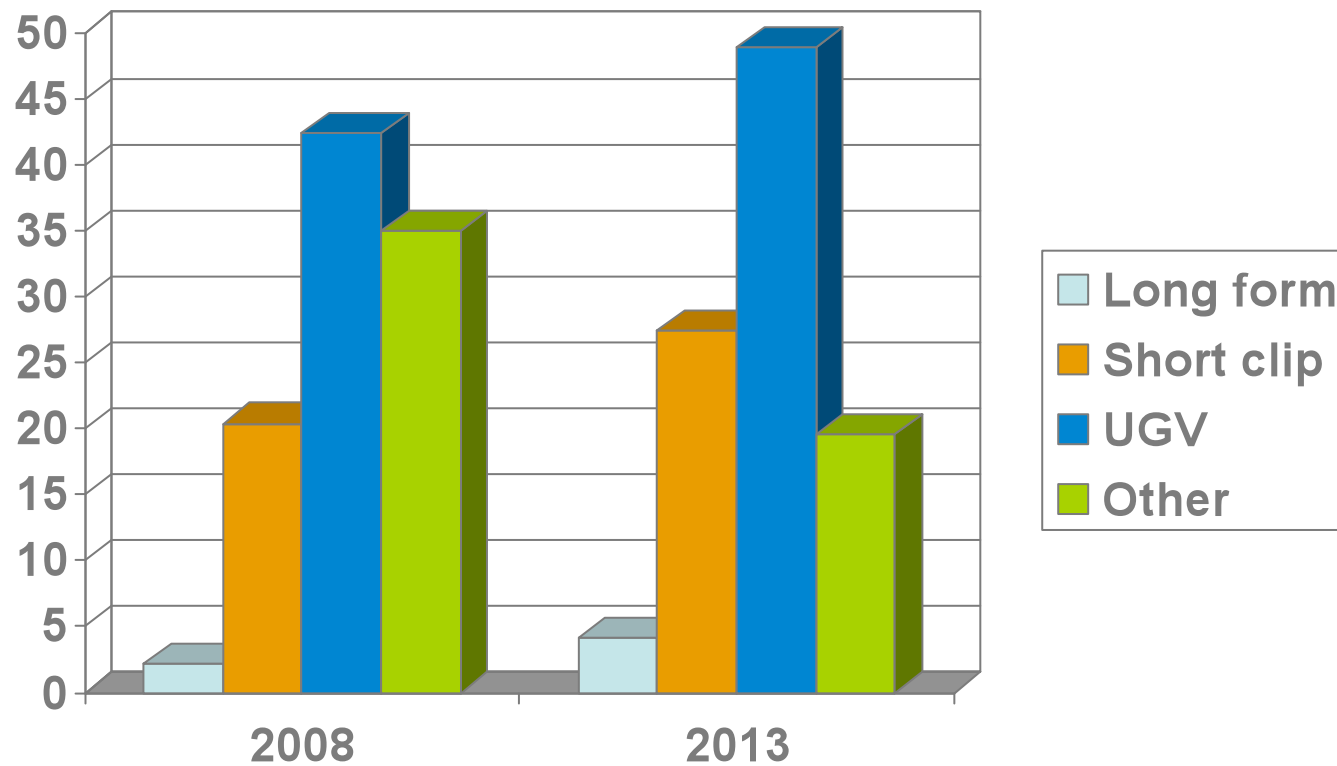
- Content – what works for you?
- Usability – simplicity the key
- Marketing – ‘viral’ is vital
- Technology – it has to work
- Distribution – stream/download
- Standards – for the future

Business models

- Subscription – niche/passion
- Pay-per-view – uncertain?
- Advertising – enough eyeballs? Models mature?

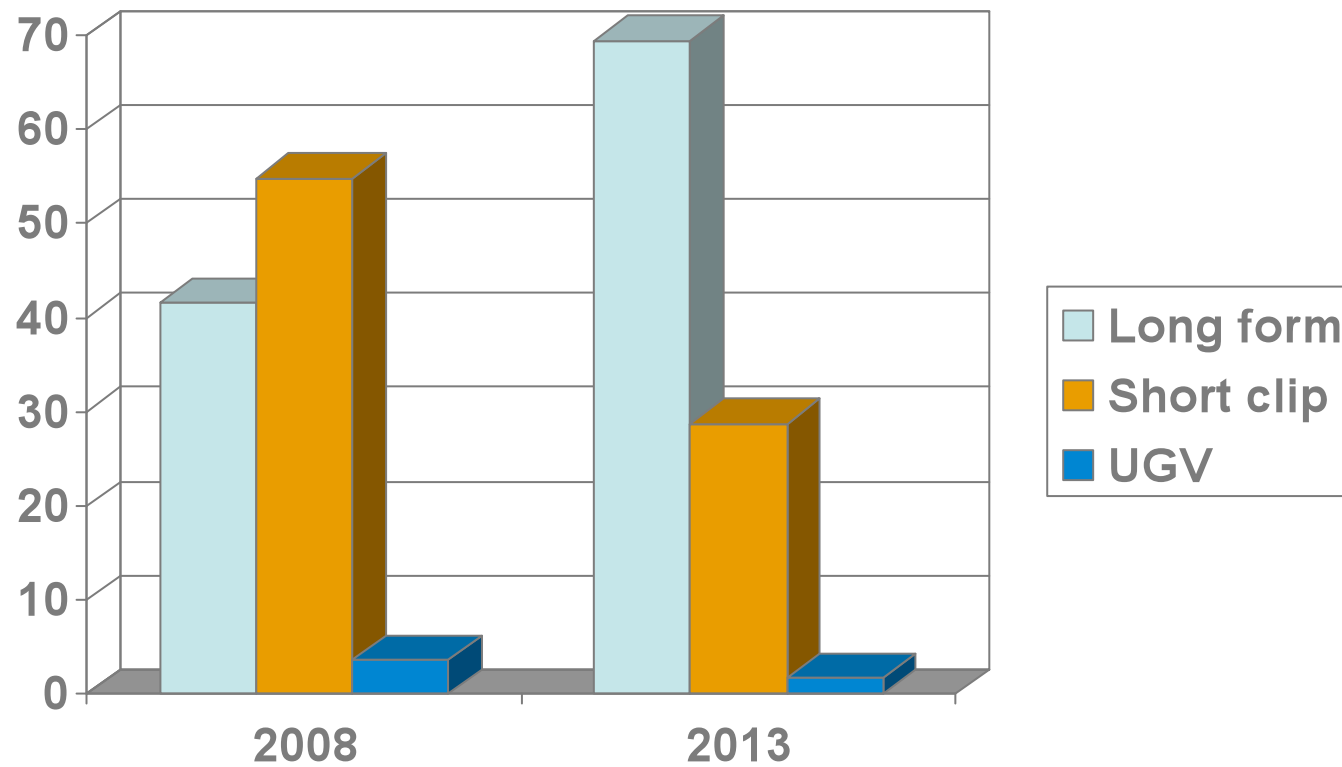
Number of online video streams (%)

(Source: Diffusion Group)



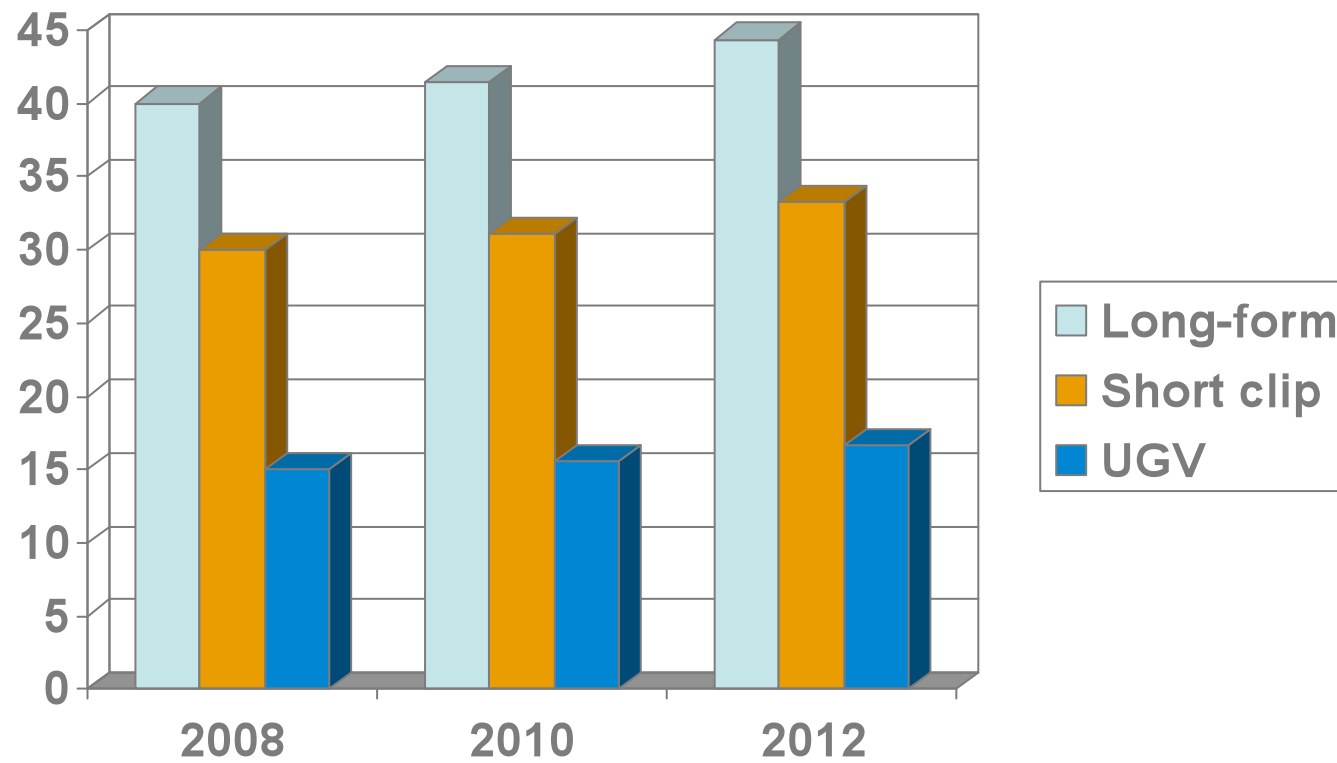
Ad revenues for online video (%)

(Source: Diffusion Group)



CPMs for online video (US\$)

(Source: Diffusion Group)



Online video - the future?

- IPTV versus 'Over the Top'
- Prepare for a device war
- Advertising will prevail
- The new gatekeepers
- Put your content online or the pirates will do it for you



Thank you - questions?

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