

國際OTT TV的發展及與傳統媒體的競合關係

劉幼琍

政大廣電系教授

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OTT TV Definition

- OTT video services defined as the distribution of video content to a wide range of IP-enabled devices (TVs, PCs, mobile phones and tablets) over the unmanaged Internet (Venturini, 2011)

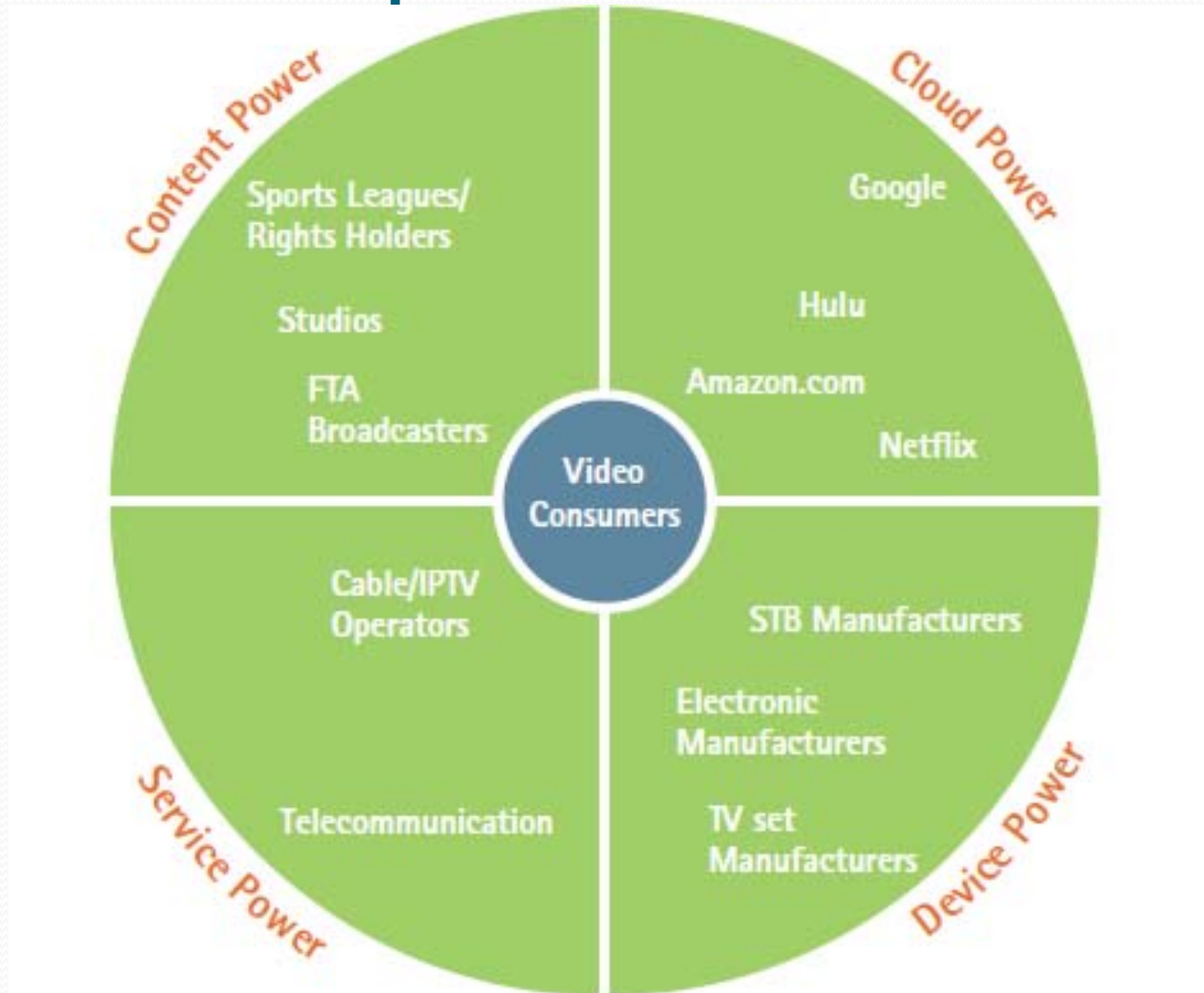
OTT Video 定義與發展

- OTT 是over the top 的縮寫，OTT Video（OTT視訊服務）指的是透過網際網路，將數位影音內容傳送到收視者所使用的各式各樣連網終端的一種服務，具有跨越時間、空間以及載具的限制，也有人將其稱為TV over Broadband（李學文，2010）。OTT視訊服務的特色是不需要擁有自己的網路，而是在公眾的網際網路上直接向終端消費者傳遞內容（陳澤奇、陳旭宇，2012）。

OTT與IPTV比較

Aspect	IPTV	OTT TV
<i>Service Provider</i>	<i>Incumbent telecoms providers</i>	<i>Anyone else</i>
<i>Technology</i>	<i>Rigid, vertical platform</i>	<i>Highly fragmented market comprising many platforms and solutions</i>
<i>Set Top Box</i>	<i>Mandatory</i>	<i>Becoming irrelevant</i>
<i>Geographic Reach</i>	<i>Mainly national</i>	<i>Fundamentally international</i>
<i>Long Term Growth Path</i>	<i>Challenged</i>	<i>Secure</i>

Competition Model



SOURCE: Venturini, 2011.



二、美國OTT TV發展趨勢與營運

美國Netflix簡介

- Netflix以DVD出租業務起家，成立於1997年
- 2007年開始提供OTT影視服務
- 每月7.99美元的月租是最主要利潤來源，全球超過3000萬個訂戶
- 在全球40個國家(主要是歐洲和美洲)擴展服務，但亞洲尚未有服務

Netflix公司創辦的經過

- 創辦人暨執行長：Reed Hastings
- 曾因自己租的[阿波羅13號]DVD過期並要求付罰金於是成立了Netflix



美國Netflix簡介

- 可透過900種裝置收看Netflix服務，包括各種智慧手機系統(ios, android...) 平板電腦,遊戲機,電視,智慧型電視等
- 消費者可隨時隨地選取自己想看的內容，且不受裝置限制可以隨時取消或重新訂閱服務



美國Netflix簡介

- Netflix: “My List” 使用平台

The screenshot displays the Netflix website interface. At the top, the red navigation bar includes the Netflix logo, menu items like 'Watch Instantly', 'Just for Kids', 'Taste Profile', and 'DVDs', a search bar with the text 'Movies, TV shows, actors, directors, genres', and a user profile dropdown for 'Michael'. Below the navigation bar, the 'My List' section is active, showing a row of movie and TV show posters including 'Better Off Ted', 'Archer', 'Mad Men', 'Doctor Who', 'Arrested Development', 'Better Off Ted', 'Firefly', and 'Hell on Wheels'. A 'Recently Watched' section is also visible on the left. Below the 'My List' row, the 'Top 10 for Michael' section features a row of posters for 'Bang Bang!', 'Supernatural', 'Spaced', 'Dr. Horrible's Sing-Along Blog', 'Alphas', and 'The House I Live In'. A detailed tooltip for 'Alphas' is overlaid on the poster, providing the following information: 'Alphas', '2011-2012', 'TV-14', '2 Seasons', 'A team of individuals gifted with extraordinary neurological abilities is tasked with solving a series of high-profile crimes. Among them are an autistic man whose mind works as fast as a computer and an FBI agent with super strength. More Info', 'Starring: David Strathairn, Ryan Cartwright', and 'Creators: Zak Penn, Michael Karnow'. At the bottom, the 'Popular on Netflix' section shows a row of posters for 'New Girl', 'Bob's Burgers', 'Frasier', and others.

美國Netflix簡介

- Netflix Social
- 整合Facebook帳號，顯示社群好友推薦的影片

The screenshot displays the Netflix website's 'Friends' Favorites' section. At the top, a red navigation bar contains the 'NETFLIX' logo and menu items: 'Watch Instantly -', 'Just for Kids -', 'Your Queue', 'Personalize', and 'DVDs -'. Below this, the 'Friends' Favorites' section is titled 'Based on these friends:' and features a grid of nine movie posters: 'Parks and Recreation', 'Portlandia', '30 ROCK', 'LOUIE', and 'IT'S ALWAYS SUNNY IN PHILADELPHIA'. To the left of the posters is a small grid of friend avatars with the text 'and 19 others'. Below the 'Friends' Favorites' section is the 'Watched by your friends' section, which includes a list of five friends: Chris Saint-Amant, Adrien Lanusse, George Hayes, Jennifer L. Nieva, and John Midgley. To the right of this list is a grid of five movie posters: 'Parenthood', 'SONS OF ANARCHY', 'how i met your mother', 'THE SECRET OF NIMH', and 'BMC THE WALKING DEAD'.

美國Netflix影音內容

1. 購買內容

- 通常不會有院線片，依照版權分配順序(電影院--飛機--電視平台)或以分次付費的方式
- 購買內容時採取購買所有權(在所有裝置上都可播放)，但受地區限制

Corie Wright, Netflix

美國Netflix影音內容

- 2. 自製內容
- 製作Netflix的獨家節目，2013年二月播出的紙牌屋影集(house of cards)共13集，獲得了14項艾美獎提名，第一個由OTT業者製作獲艾美獎提名的節目
- 有別於有線電視一周播出一集的方式，Netflix一次就將影集全部共13集釋出

Corie Wright, Netflix

美國Netflix影音內容

- 紙牌屋(house of cards)兩季共26集，預算約100萬美元
- Netflix不像一般需要廣告營收的節目，需要在固定時間觀看，在乎的是觀眾是否喜歡他們代理的節目(節目沒有時限性，可持續觀看)
- 在製作節目上有更多彈性，不必特別迎合黃金時段的觀眾喜好，能製作高品質的系列紀錄片

Corie Wright, Netflix

Netflix



Netflix: 14 Emmy nominations and 3 awards



• "Television has changed a lot in six years ... a big part of what has changed is streaming video on demand, specifically with operations like Netflix and iTunes and Amazon." (*Breaking Bad* creator Vince Gilligan)

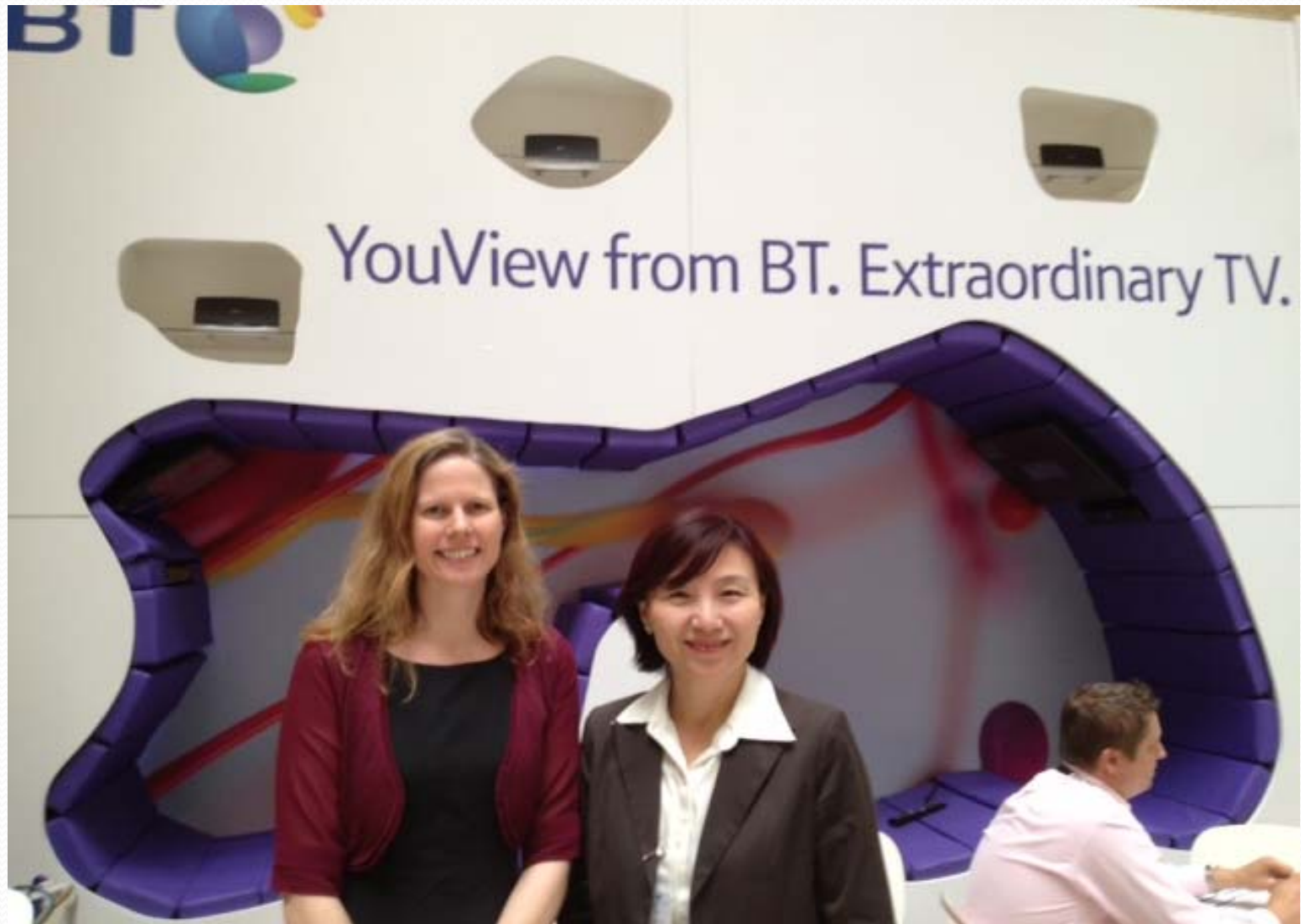


三、英國OTT TV發展趨勢與營運

英國 Youview 簡介

- YouView於2012年6月正式宣布營運
- YouView由7家不同類型的服務業者所組成，包括網路業者BT、TalkTalk；內容供應商BBC、ITV、Channel 4、Channel 5以及共同傳輸公司Arqiva，總投資額達約7,000萬英鎊

Youview (UK)



YouView

- Partnership (launched in July, 2012)
BT, Talk Talk, Arqiva
BBC, ITV, Channel 4 and Channel 5
- Provide access to Freeview TV and TV on Demand via a 'hybrid' STB, connected with a broadband connection and a TV antenna
- No contract and no subscription for accessing catch-up and Freeview content
- Only buy a set-top box or to get it free if having 12-month contract with BT or Talk Talk

英國 Youview 營運模式

1. 無線電視方面

- YouView 內建有無線電視接收器，可接收 Freeview 目前所提供電視與電台頻道
- Freeview 共有 55 個 SD 頻道、5 個 HD 頻道、25 個數位廣播頻道
- YouView 機上盒有內建硬碟，民眾可錄製 Freeview 所提供的影音服務

英國 Youview 營運模式

2. 連網服務方面

- YouView 整合 BBC、ITV、Channel 4、Channel 5 的線上影音服務，括：BBC iPlayer、ITV Player、4oD 及 Demand 5
- 民眾可以檢索、回溯並下載 7 天前所播出節目

英國 Youview 營運模式

- 由於有 TalkTalk 及 BT 入股，目前兩家公司陸續推出套裝方案，吸引既有訂戶與新訂戶申裝 YouView 機上盒
- 藉由 YouView 機上盒減價活動，推銷自家的三合一服務「電話+寬頻上網+電視」(triple play)

英國 Youview 營運模式

- YouView 亦著手擴大付費影音的類型，藉以提昇付費內容的收益
- 目前已有 BSkyB 與 Scottish Broadcasting 兩家內容供應商與 YouView 合作，提供消費者付費影音內容
- 大概有約 300 多家的內容供應商有高度的興趣加入 YouView 平台



四、法國OTT TV發展趨勢與營運

法國 Dailymotion 簡介

- Dailymotion 成立於2005年，是法國 Orange 旗下的視頻分享網站
- Dailymotion 擁有3千5百萬筆影音內容，透過36個國家首頁、18種語言推廣至全球，每月觀看視頻數為25億
- 15%市場在法國本土、85%的市場在全球，包括日本、南美洲、英國、德國、義大利

法國 Dailymotion 簡介

The screenshot shows the French Dailymotion website. At the top, there is a dark blue navigation bar with the Dailymotion logo, a search bar, and links for "Parcourir" (Browse), "Envoyer une vidéo" (Upload a video), and "S'identifier" (Log in). Below the navigation bar is a banner for a game titled "Qin Beauty" with various interactive buttons in Chinese like "開始遊戲" (Start Game), "劇情模式" (Story Mode), "遊戲設置" (Game Settings), and "退出遊戲" (Quit The Game). A secondary navigation bar contains categories: VIDEO & STARS, HUMOUR, SPORTS, MUSIQUE, CINÉMA, SÉRIES INÉDITES!, and JEUX VIDÉO. The main content area features a "NEWS" section with a featured article about Daft Punk's plagiarism accusation, accompanied by a video thumbnail of a man playing a guitar. To the right of the main content is a sidebar with a "Se connecter" (Log in) button and a "Fil d'actualité" (News feed) section listing recent uploads from various users and groups. At the bottom, there is a footer with links for "Dailymotion", "Programmes", "Aide", "Légal", "Extras", and "Développeurs".

法國 Dailymotion 營運現狀

視頻生成

1. 媒體合作
2. 民眾自行上傳視頻
3. 提供免費攝影棚收集影音內容

後製處理

1. 與民眾簽訂合約確保品質
2. 採用事後審查制度

通路服務

1. 網路社群
2. 部落格
3. 數位機上盒服務
4. 電視
5. 行動裝置

收入種類

1. 廣告
2. B2B提供雲端

資料來源：Dailymotion 官網

法國 Dailymotion 營運模式

- 目前30% 的民眾是從智慧型手機、68-67% 是從電腦去收看Dailymotion節目，但行動手機呈現成長的趨勢，所以行動收視的還是增加
- Dailymotion可被視為是影音平台，業者並不在意使用者用的是哪一種硬體，主要是每天都更新內容，滿足使用者的需求

Daily Motion秘書長，Giuseppe de Martino

法國 Dailymotion 營運模式

- 2013年9月份Dailymotion於法國市中心創建一個600平方米的攝影棚
- 每個人都可以免費使用，主要採用預約制，使用者擁有影音內容版權，但相關內容必須提供給Dailymotion使用
- Dailymotion透過與使用者簽訂合約的方式，確保產製的內容品質

Daily Motion秘書長，Giuseppe de Martino

法國Dailymotion節目來源

- 現在主要採取合製（co-production）
- Dailymotion提供技術平台，預計2014年8月會在土耳其開發新的內容平台（包括：電影、運動....）
- Dailymotion的收入來源是「廣告」，主要從美國和法國，廣告會在節目之前或後之前出現，觀賞者可以自行關掉廣告，所以不是強迫收視(譬如5秒的廣告)

Daily Motion秘書長，Giuseppe de Martino

Dailymotion



OTT TV in Japan-1

- OTT TV providers: AcTVila (alliance of Hitachi, Panasonic, Sharp, Sony, and Toshiba), Hulu (from the US), Gyao)
- OTT TV take-up is slow
- Lack of programming
- Not many on-demand videos available online
- The DVD rental release window is often long before it becomes available on any streaming site
- Rental shops are still ubiquitous
- Content providers are hesitant to put their programs online.
- User interface is not friendly

Source: *Hiroki, 2011*

OTT TV in Japan-2

- User behavior: The elderly are resistant to change
- Broadcast TV programming can be accessed on many devices
- Not used to passive television experience
- The location shifting of Japanese content using a device such as the Slingbox was found to be illegal
- Watching TV is more of a passive and social experience

• Source: *Hiroki, 2011*

OTT TV in S. Korea-1

- OTT provider: KT Skylife, KBS, MBC, SBS, CJ, etc.
- KT Skylife was considered as illegal service by the KCC (2012, 8)
- Dish convergence solution (DCS) transmits digital broadcast through the Internet, eliminating the need of a disc-shaped antenna.
- KT Skylife argued its service was practically the same as Internet protocol TV, which also used the Web to transmit programs.
- Cable companies sent complaints to the KCC.

CJ HelloVision's TVing

- Offered as a subscription-based service to all consumers in South Korea, not just CJ HelloVision subscribers, and to all connected devices including tablets and smartphones.
- TVing will also be available via an app on Smart TVs sold in South Korea. So, CJ HelloVision's reach can now extend well beyond its cable footprint.

- *(Brett Sappington, Parks Associates, Aug. 3, 2011)*

CJ Tiving (OTT)

- 200 channels and 50,000 VOD titles
- TV replay features
- Provide 5, 8, or 13 USD pricing tiers
- 4 million users, only 150,000-200,000 paid for service
- 80% use mobile devices to watch programs

OTT TV in S. Korea-2

- Samsung's Smart TV case: Network neutrality issue
- KT does not allow connected TV's free piggy-backing
- KT is outraged that the connected TV manufacturers (such as Samsung) use KT's broadband infrastructure as a delivery mechanism for their content and refuse to pay KT.
- KT says its "ecosystem could collapse if free riding [OTT] data explosively grows on the network"
- KT insists that it must be compensated for the huge loads that connected TV traffic is placing on its network via the huge video traffic it generates.

OTT TV in China

7 OTT license holders

- CNTV（中國網絡電視台）是由CCTV成立
- BesTV（百視通）是由上海廣播電視台與上海東方傳媒集團共同控股
- Wasu（華數）是由杭州文廣集團與浙江廣電集團投資
- SMC（南方廣播影視集團網）是由南方廣播影視集團成立
- CIBN（中國國際廣播電視網絡台）是由中國國際廣播電台開辦
- MangoTV（芒果電視）是湖南衛視旗下的網路電視台
- CNR（央廣網）是由中央人民廣播電台開辦。

- OTT在國外是通過電視直接連接到網路的形式，在大陸由於規定電視是不允許直接連到網路。
- 最初電視廠商與軟體提供商合作，通過機上盒連接到家裡電視，但是後來被禁止，因此電視機廠商改由通過OTT的盒子，實現類似網際網路電視，亦即所謂智慧（智能）電視，自行提供了許多網路內容，如電視、電視劇、視頻節目、娛樂節目。
- 因此大陸的OTT和網路電視還是有區別的，在國外則是網路電視實際上就是OTT TV。

OTT TV in China

- IPTV licenses go to TV groups. Telcos only provide broadband
- Most of the big TV groups are aware of the emergence of OTT. They also provide OTT services—coopetition
- IPTV+OTT
- Outsourcing
- No linear channel is allowed

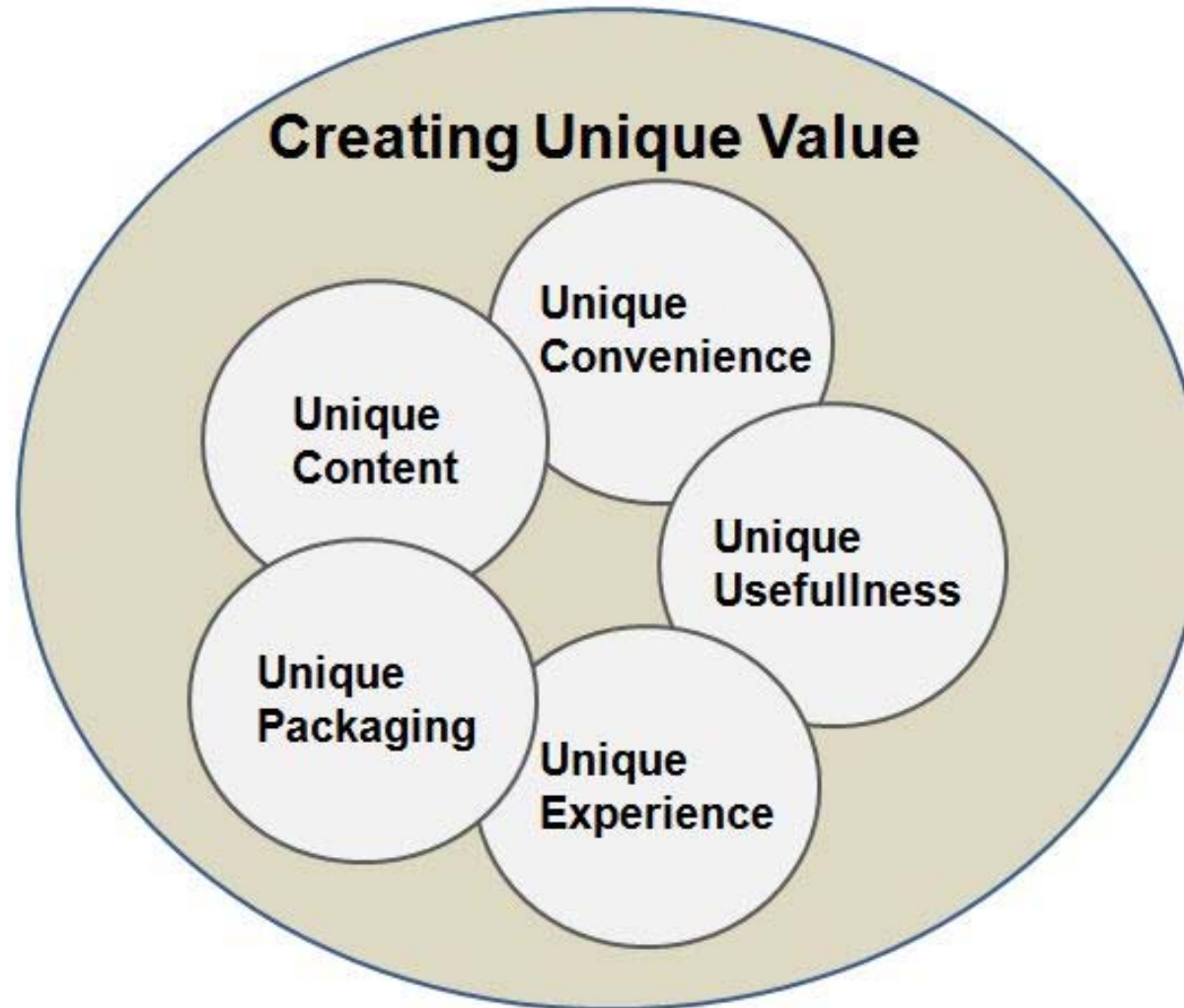
OTT TV in China

- In the past, some content provided by the Internet TV caused copyright problems. It has been improved.
- The regulation is still in favor of the TV groups or broadcasters.
- OTT TV has great potential as long as the regulation does not limit its growth.

Video viewers via internet in Taiwan

	Total audiences (million)	Average view frequency	Average view time (min)	Average browse numbers
<i>Google site (ex. YouTube)</i>	9.007	47.0	211.0	4.9
<i>Yahoo! site</i>	7.643	5.3	27.6	1.7
<i>facebook</i>	3.825	5.4	14.0	1.5
<i>VEVO</i>	2.417	9.4	27.2	2.4
<i>Viacom Digital</i>	2.319	5.6	17.7	1.7
<i>Youku Inc.</i>	2.241	11.0	93.4	2.3
<i>Chunghwa Telecom</i>	2.171	5.7	49.4	1.6
<i>PPStream, Inc.</i>	2.112	37.6	427.9	2.5

Five ways to build Unique Value



Source: Sandvand, 2010.

Impact on the Content Providers

- Provide more opportunity
- Provide more revenue
- Only interested in collecting content fees

The strategies of Content Providers and Broadcasters

- Content providers:
- providing services directly to consumers
- distributing content through OTT players, while keeping B2B relations with their traditional distributors
- Broadcasters:
- diversifying into premium services and following eyeballs onto on-demand platforms

Taga & Schwaiger, 2012

Impact on the Existing Media Platform

- More competition

Coopetition

- Cooperate with TV manufacturer (smart TV, connected TV)
- Cooperate with content providers
- Cooperate with network operators
- Cooperate with ISPs
- Cooperate with cable MSO
- Using APP