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English

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TITLE: Measuring digital broadcasting: The U.S. experience and thoughts for the future

Measuring Digital Broadcasting: the U.S. Experience and Thoughts for the Future



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The ITU Indicators - 1

- I. 78 Terrestrial Multichannel TV subscriptions
- + I. 79 Direct-to-Home (DTH) satellite antenna subscriptions
- = I. 77 Multichannel TV subscriptions

The ITU Indicators - 2

I. 78 includes multiple technologies:

- Cable TV
- Internet protocol TV (IPTV)
- Digital terrestrial TV (DTT)
- Other terrestrial TV, including microwave multipoint distribution systems (MMDS) and satellite master antenna television (SMATV)

FCC Implementation

- I. 77 equates to U.S. category “Multichannel Video Programming Distributors” (MVPD)
- Data obtained from a variety of third-party sources to construct subscriber estimates

Primary Terrestrial MVPD Components

- Cable
- Telcos
- Private Cable Operators (PCO)
[equates to SMATV]

Primary Satellite MVPD Component

- Direct Broadcast Satellite (DBS)
[equates to DTH]
- Note: In U.S., no free MVPD service

Terminology Correspondence

FCC	<==>	ITU
Cable	<==>	CATV
Telco	<==>	IPTV and CATV
PCO	<==>	SMATV
DBS	<==>	DHS
BRS/EBS	<==>	MMDS

Reporting Challenges

- Large number of firms; even identifying all providers difficult
- No data for many smaller firms, or for some larger firms not publicly held
- No official government reporting requirements provide the needed data
- And -- the rise of video over the Internet: **Online Video Distributors (OVDs)**.. E.g., Netflix. Also called Over-The-Top video

Online Video Distributors (OVDs)

- Video over the Internet, to a variety of devices. Professional content. Without own distribution facilities
 - OVD services are *not currently* included in the definition of MVPD or Multichannel TV
 - Multichannel TV operators that provide video over the Internet to their own customers are *not* providing OVD service

FCC Data Sources and Process

- For total terrestrial, total cable, and total telcos: data obtained from research firm SNL Kagan
 - Report: “U.S. Multichannel Industry Benchmarks”
 - Proprietary data FCC purchases – has limited rights to make public
- For satellite service, data obtained from the providers

The Data - U.S. Subscribers

		2009	2010	2011
Indicator 77	Multichannel TV subscriptions	100,600,000	100,800,000	101,100,000
Indicator 78	Terrestrial multichannel TV	68,000,000	67,500,000	67,200,000
Indicator 79	Direct to home (DTH) satellite antenna subscriptions	32,600,000	33,300,000	33,900,000

Data Dissemination

- FCC competition reports to U.S. Congress entitled “Annual Assessment of the Status of Competition in the Market for the Delivery of Video Programming”
- ITU

A Possible Improvement

Consider expanding the Handbook's discussions of Indicators 77 and 78, to be more explicit and clear that subscribers to OVDs – video over the Internet – are not currently included in the definitions

An Idea for the Future

Consider how to *separately* track OVD usage

- A potential substitute for Multichannel TV service. And a potentially large sector
- Challenge: not all OVD consumption is subscriber-based, and usage is hard to measure