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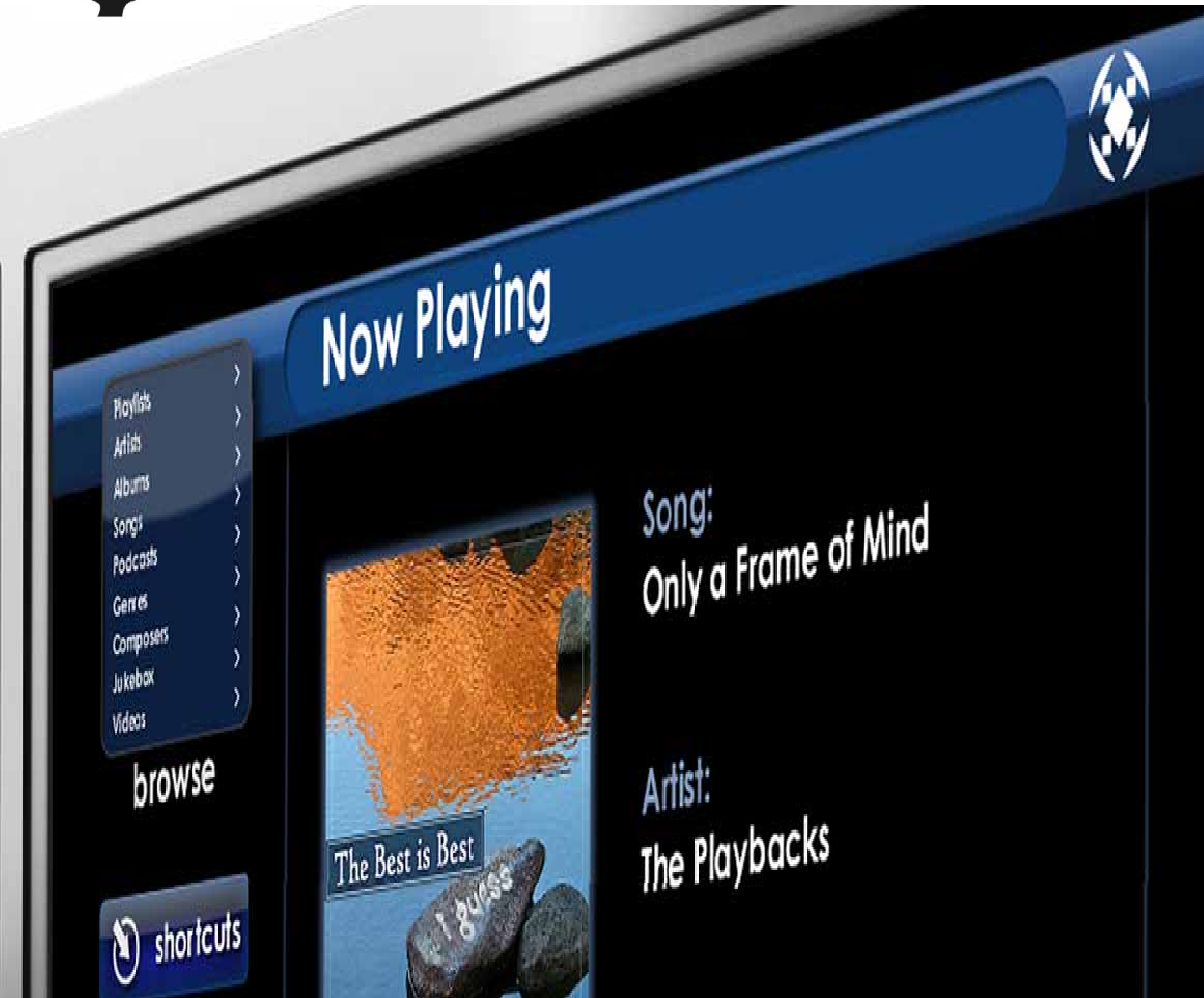

Hybrid TV and Over the Top TV Status Report

April 2010

Overview

Hybrid TV is the use of a broadcast and IP connection for the delivery of a TV service. Hybrid TV is not new; in 2008 the majority of IPTV STBs (Set Top Box) shipping in Europe had digital terrestrial TV (DTT) tuners in addition to an IP connection. However, for many the shift to hybrid TV has been a quiet revolution. Especially given two of the telco industry's most successful TV deployments, Verizon FiOS (2.9M customers in Q4 2009) and Orange TV (2.1M customers in 2009), are both hybrid TV. The whole of the payTV industry is now taking notice of what this means.

This report brings together work performed on hybrid TV over the passed year through over 200 operator and supplier interviews and online questionnaires, gathering information on deployment experiences, market requirements, competitive landscape, and technology trends.

Report Structure:

This 114 page report including 57 figures examines the current status of hybrid TV and Over The Top (OTT) TV with the following sections:

- Introduction: providing definitions and a brief global round up of hybrid TV activities including standardization.
- Understanding the TV ecosystem: an important section for all readers from the telco industry. Neither IPTV nor hybrid TV can be treated as an isolated industry; they're the delivery pipes for the much larger, complex and well established TV industry.
- Deployments and learning: reviewing hybrid TV deployments and the lessons learnt.
- Drivers for and business case of hybrid TV: based on market research in understanding why operators are moving to hybrid TV.
- Interactive services and STB (Set Top Box) applications: understanding an important category of services enabled by hybrid TV.
- OTT market status: examining this complex and rapidly changing Internet TV market.
- Hybrid TV suppliers: reviewing both solution providers and STB suppliers.
- Operator rankings and requirements: based on market research of operators' perceptions of suppliers and their requirements for hybrid TV solutions.
- Future of hybrid TV and recommendations for members of the ecosystem.

Target Audience

- PayTV operators (telcos, cable operators, satellite TV, and terrestrial TV) providing insight into the factors behind hybrid TV's success, and recommendations in retaining value in the evolution of the TV industry
- PayTV and telco equipment providers: understanding the emerging hybrid TV opportunity and operators' requirements
- STB application developers: helping understand where to focus in building STB applications
- Investors: where the investment opportunities reside in the emerging hybrid TV landscape

Key Report Findings

- The Telco TV (IPTV) market, though growing, remains less than 10% of the total payTV market through to 2013. However, as cable, terrestrial and satellite providers examine interactive TV options, they will likely go hybrid.
- The payTV market is predicted to reach 575M subscribers in 2012, compared to telco IPTV of 45M subs, so the addressable market for hybrid TV is potentially vast, hence why it needs to be on the agenda of all telco / TV suppliers.
- Currently HbbTV has the industry's attention, which is CE-HTML based. Its supporters claim DVB MHP/GEM had its chance; technology and customers' expectations have moved on. Operators appear more circumspect, given the operational headaches in deploying the latest technology. We're likely to see the CE (Consumer Electronics) manufacturer's take the lead, if it works reliably at scale, and customers enjoy the experience operators will likely follow.
- PayTV providers' strength today comes from their network, the hours customers spend watching TV over their networks, and an established and sophisticated business model. So the skill comes in ensuring they remain the content owner's best path to cash from the customer. Hence ensuring continued high levels of consumption and leveraging their networks is required.

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