

Hybrid TV Landscape in Spain

rtve.es

Some Figures

- According to GFK , 99.5% of the Spanish homes have a TV set while 68.7% of them have Internet . 26% are connected to the Web while they are watching TV.
- 19% of the TV sets being sold out in Europe have internet access. But in Spain only 9% of the TV sets being sold out are prepared to access the internet.
- 87% of spanish internet audience view online video
- 22% use videogame consoles to watch TV series and TV programmms

Some insights

- Spanish users watch more TV content on line than the european average.
- Besides PC's, videogame consoles are the preferred device to provide with conectivity to TV sets
- TV sets with connectivity aren't yet remarkable although is growing.

- MHP way to provide interactivity to TV has been abandoned almost completely.
 - CE manufacturers has launched new product lines including connectivity during the last year. They made some agreements with several broadcasters.
 - Telcos starts to look for how to position trying to catch the opportunity
 - Lack of leadership and agreement among broadcasters.
 - New to come: Apple iTV, Google TV
- ... and the consumers are not aware about this.**

Telco's way to hybrid TV

Vodafone:

Vodafone TV. New service launched in November. DTT HD decoder with broadband connection .



ONO:

Agreement announced on July. Activities will start on 2011. Only for its cable customers.



Movistar:

New service announced: Mediabox. A set up box with connectivity. TV series and Films



Sony:

- Started on march 2010.
- Broadcasters on board: la sexta, Antena 3 and Tv3
- Roadmap: to move to new advertisement services and pay platform .
- No penetration data

LG:

- Product launched already. Last service update done in November 15th
- Service include: Antena 3, TerraTV (Movistar)
- Roadmap: new service update next January with new agreements. Full browser in March.
- HBBTV: on study
- Data: 30% TV sets sold are “hybrid”. Forecast 2011: 65%

Samsung:

- Products in the market from April.
- Local services: Antena 3, Canal Historia, Canal cocina, Sol music, ADN stream
- Roadmap: to continue with widgets approach on 2011. Focus on wi-fi approach.
- HBBTV: No plans to join
- No market data disclosed

Philips:

- In the market from 2009
- Local services: TV3
- Roadmap: New broadcasters to join on 2011: Antena 3, La Sexta, ETB. 3 new videoclub services. HBB in all product line in 2Q 2011
- No market data disclosed

- Panasonic
- Magicbox
- Yuixx/Conceptronic
- In&Out

Broadcasters approach to HBB

- First try in 2009. Project “TDT.com”
- Led by Abertis Telecom and Microsoft
- To move forward the project needed of a wide agreement among different operators and to create a consortium.
- Broadcasters felt that it was an external initiative



Selector de canal



Pantalla principal



EPG



Explorador



Buscador

- Agreements with CE Manufacturers and telcos. Most active: Antena 3, La Sexta, TV3 and RTVE.
- RTVE: different platforms testing but no one finally launched. Only on Sony PS3 and Vodafone TV



Research from TV3 to test the users perception of new HBBTV services:

- Users state that it will change the way they relation with TV. They remark that they feel free from using the PC to watch video on line
- More used services: programm information and video on demand
- They don't like intrusive ads: preroll, etc.
- Young people looks for a experience close to PC while older people needs more simplicity.

ODITOFI: On Demand Interactive Television Over the Future Internet. VOD service platform for TV sets with IP connection. Partners: TV3 and RTVA.

C24H extended: Testing on how to delivery video streaming to IP connected TV's.

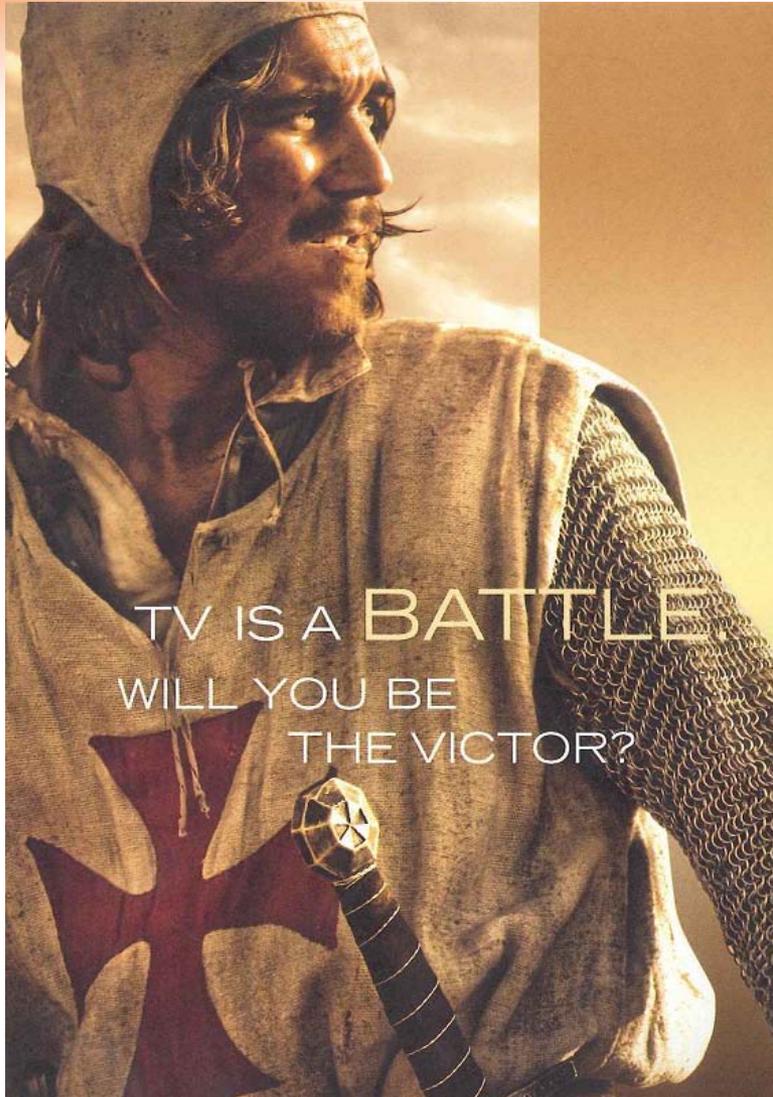
TV accesible: Development of the technology to send two picture in picture signals: one coming from DTT and other from IP. This includes the test to send signal language through IP on DTT broadcasting signal

What Hybrid TV must be

- Standardized
- User Centric
- TV audience oriented
- Not a “techie” thing
- It must keep broadcasters prescription of its own content since TV content is the main driver.



rtve.es



Thank You!!