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AUGUST 2011

TV Everywhere — Realizing the Vision

AUTHOR

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Science fiction is great. For years, books and films have painted a picture of a pushbutton future where technological advances have made our lives easier and richer. Need dinner? Push a button and an automated system serves it to you. Time to clean up? Push another button and your faithful robot attendant will tidy things up. Everything you want is at your fingertips right when you want it.

Over the past two years, part of that vision has shifted to reality. Pay-TV multiscreen services have quickly emerged in many different markets throughout the world. Like characters in a science-fiction novel, many consumers can get their TV content on any screen and in many cases at the time of their choosing. Only a few operators offered this service in 2009, but by mid 2011, 40% of pay-TV subscribers in Western Europe will be able receive some type of TV Everywhere service from their pay-TV provider.

CATALYSTS FOR GROWTH

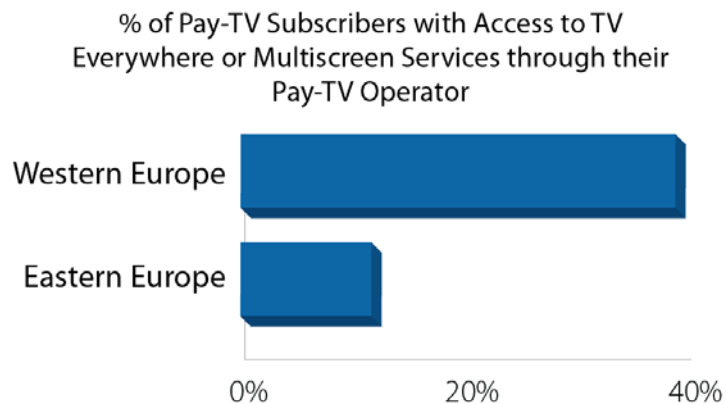
- Broadband penetration
- Connected devices
- Smartphones
- Consumer habits and usage
- New services

Several factors have contributed to the emergence of these residential services. Along with increased broadband penetration, the number of connected devices has similarly increased. Smartphones and Internet-connected products such as connected TVs, Blu-ray players, game consoles, and set-top boxes have become more common.

At the same time, consumers have become accustomed to watching premium video content on their mobile phones and computers. In several nations, the mobile phone rivals or surpasses the PC as the dominant second screen for video. Multiple operators in Western Europe report the top feature demanded by consumers is the ability to access desired content on any device in the home.

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Availability of Multiscreen/TV Everywhere Services to European Pay-TV Subscribers



Source: *TV Everywhere: Growth, Solutions, and Strategies*
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Noting these trends, pay-TV service providers have moved aggressively to add multiscreen capabilities. While innovative operators including Ziggo, Orange, Swisscom, and Sky introduced multiscreen TV services as early as 2006, most of the multiscreen initiatives present in European markets today arose over the past year.

For the most part, telcos have outpaced their cable counterparts, but as the number of operators offering multiscreen services grows, the pressure is increasing for other operators in the same markets to deliver similar services.

Swisscom first offered consumers EPG functionality and other features for the mobile phone in 2006 but with little uptake. In early 2011, Swisscom released a new version of the application, this time for the iPhone and Android-based smartphones, with a different and positive result. Swisscom speculates that changing consumer usage models, the greater usage of app downloads, and touch screen interfaces for smartphones were the reasons for this improvement.

TV-Centric Multiscreen Features

Video	Handoff of video between the TV and mobile devices, DVR scheduling and file management
Connectivity	Content discovery, integrated search/recommendation, account management, sharing files for TV viewing (photos, video)
Communications	Unified messaging, caller ID and voicemail management online and on the TV, TV-oriented social networking features
Source: <i>TV Everywhere: Growth, Solutions, and Strategies</i> © Parks Associates	

Many operators must charge for multiscreen services to offset implementation costs and to possibly make the service profitable. In some cases, pay-TV operators provide in-home Wi-Fi access to TV content (via mobile phone) for free but charge a fee for out-of-home access to the same content. Orange France combines its IPTV and mobile TV offerings in a triple- or quad-play bundle where the mobile TV service is usually free of charge for bundle buyers. For its mobile phone-only customers, Orange offers a mobile triple-play of voice, data, and mobile TV.

With service availability, connected device penetration, and consumer interest in multiscreen video growing, service uptake by subscribers will increase, moving us closer to that science-fiction pushbutton world.

Now, if someone can start working on that robot attendant...

CONNECTIONS™ Europe

Parks Associates will present consumer research and analysis on these topics (with the exception of the robot attendant) at [CONNECTIONS™ Europe: Cloud Services, CE & Service Provider Strategies](#), November 8-9, 2011, in Amsterdam. Main topic areas:

- Digital media and connected CE
- Video-on-demand; multiplatform video; and TV Everywhere
- Impact of New Technologies

Event will feature multiple Research Sessions, with data from the consumer study

Connected Consumer in Europe:

- Cloud Services: Increasing ARPU
- Myths, Truths and What Consumers Really Desire
- Multiscreen TV: The Analyst Perspective

Visit www.connectionseurope.com for more information and to register.

About Parks Associates

Parks Associates is an internationally recognized market research and consulting company specializing in emerging consumer technology products and services. Founded in 1986, Parks Associates creates research capital for companies ranging from Fortune 500 to small start-ups through market reports, primary studies, consumer research, custom research, workshops, executive conferences, and annual service subscriptions.

The company's expertise includes new media, digital entertainment and gaming, home networks, Internet and television services, digital health, mobile applications and services, consumer electronics, energy management, and home control systems and security.

Each year, Parks Associates hosts executive thought leadership conferences CONNECTIONS™, with support from the Consumer Electronics Association (CEA)®, CONNECTIONS™ Europe, and Smart Energy Summit.

<http://www.parksassociates.com>

<http://www.connectionsconference.com>

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About the Author

Brett Sappington is currently Director, Research with Parks Associates.

Brett has spent over fifteen years in the industry as an executive manager and entrepreneur, building new businesses and new divisions for technology and business services firms. Previously, he founded and served as vice president of sales and marketing for Teligy, a software company specializing in embedded software for wired and wireless communications systems. Brett established new divisions for audio/multimedia software and networking for Intelligraphics. He has also been involved in the development and marketing of early-market products for 802.11 wireless networking, PC-based VoIP, and other technologies.

INDUSTRY EXPERTISE: International Digital Living Trends, Television Services (IPTV, cable, satellite/DTH, terrestrial/DTT), Broadband Services, Multiscreen Services, Value-added Services, Cloud-based Consumer Services, Set-top Boxes, Residential Gateways, Electronic Program Guides, Video Search and Recommendation, Video Metadata, Middleware



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