

Emerging Display Technologies Special Report

TV Manufacturers Look to New Directions of Connectivity with IETV

By Riddhi Patel, Principal Analyst and Randy Lawson, Senior Analyst

Forecast**Frequency, Time Period**

- 5-year annual
- 2009 - 2013

Measures

- Internet-Enabled TV Units
- IETV Semiconductor revenues

Regions, Markets

- Consumer TV market
- North America, Europe, Asia, Japan, China, ROW (LA, MEA)

Detail Level

- Regional shipments of IETV
- Regional semiconductor revenues
- Multi-format decoder, interface semiconductor

Applications/Products Covered

- Digital Televisions with internet connectivity
- Multi-format decoders

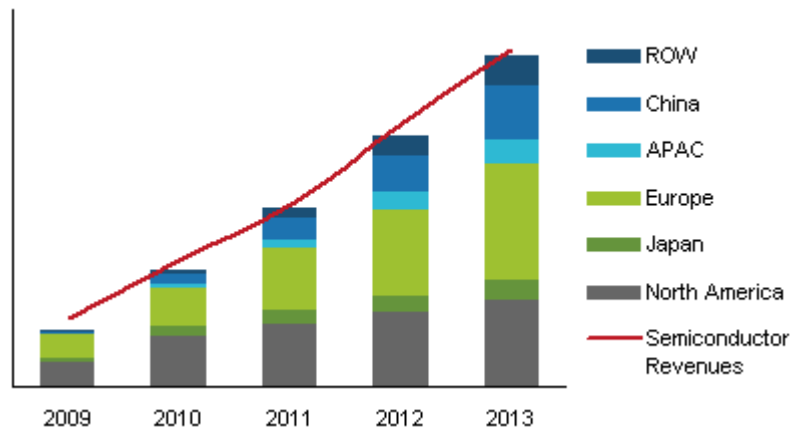
Technologies Covered

- MPEG4/H.264/VC-1 decoders
- Networking technology for CE
- System on Chip video processors
- Internet connected TVs
- Over-the-top video access

Consumers are looking for ways to access various available content sources without adding more boxes or connections to existing TVs and that is where Internet Enabled TVs, or IETV, will play an important role.

IETV is defined as a set that has integrated ability to allow connection to the Internet via an external broadband modem. Such a TV set will support some form of web browsing and will allow client-run applications on the set to access content directly from the web from third-party content vendors such as Hulu, AmazonOnline, the New York Time and of course, the extremely popular YouTube.

As the TV set market is so often governed by declining prices, brands are looking at options or ways to differentiate their TV line up from competition and iSuppli expects that, given the strong push TV OEM's are making into this application space that IETV will be an important new feature OEMs will use to help with not only differentiation but also increases the possibility of charging a premium. This move towards increased connectivity and support for Over-the-Top content access will also increase demand for multi-format decoders for Digital TV sets across the globe, along with a higher penetration rate of networking capability supported by the processor platform of IETVs. This additional connectivity and access to new content providers will help to provide a much needed boost to the slowing semiconductor growth rate for the maturing flat panel TV market worldwide.

Regional Shipments of IETV, Semiconductor Revenues**Critical Questions Answered**

- What is the forecast for internet-enabled television sets over the next four years?
- Which TV OEM's are supporting IETV platforms currently and how do their products and strategies differ?
- How are the system requirements different for IETV from a standard TV?
- Which semiconductor suppliers are competing in this segment and how do their solutions differ?
- Which codecs need to be supported in future DTVs?
- What will the regional adoption rate be for multi-format decoders in DTVs?

Who Should Read This?

- DTV semiconductor manufacturers
 - Marketing
 - Market intelligence
 - Sales
 - Product definition & systems engineers
- TV OEM & ODM manufacturers
 - Marketing
 - Procurement
 - Product definition & systems engineers
- Financial community

Lead Analysts

Riddhi Patel, Principal Analyst

Riddhi is responsible for the television and plasma display panel (PDP) analysis. The scope will include creating and implementing industry surveys, market sizing and forecasting, and evaluating the impact of broad market factors on television and PDP demands.

Riddhi most recently worked as Senior Market Intelligence Manager at a Silicon Valley venture capital firm where she was responsible for the strategic marketing, market research and business development initiatives for the portfolio companies. Riddhi previously held various analyst positions at Gartner/Dataquest and AberdeenGroup where she was involved in traditional market research and analysis as well as custom consulting.

Riddhi earned an MBA in Marketing and International Business and Bachelor of Science in Physics, from South Gujarat University and Maharaja Sayajirao University.

Randy Lawson, Senior Analyst

Randy comes to iSuppli with extensive industry experience in semiconductor design and applications for consumer electronics and DTV systems. He spent over 15 years with Texas Instruments in various engineering design, product definition and management roles. He began his career in display electronics design, afterwards moving to PC and CE connectivity applications and technical marketing. Randy has also been involved in both chip level and DTV systems design, helping lead teams that developed some of the first 1394 devices that supported DTCP content protection and high speed networking applications

Randy is an alumnus of the University of Tennessee and holds a Bachelor of Science in Electrical Engineering.

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