



Digital Life-Style

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Discussion Topics



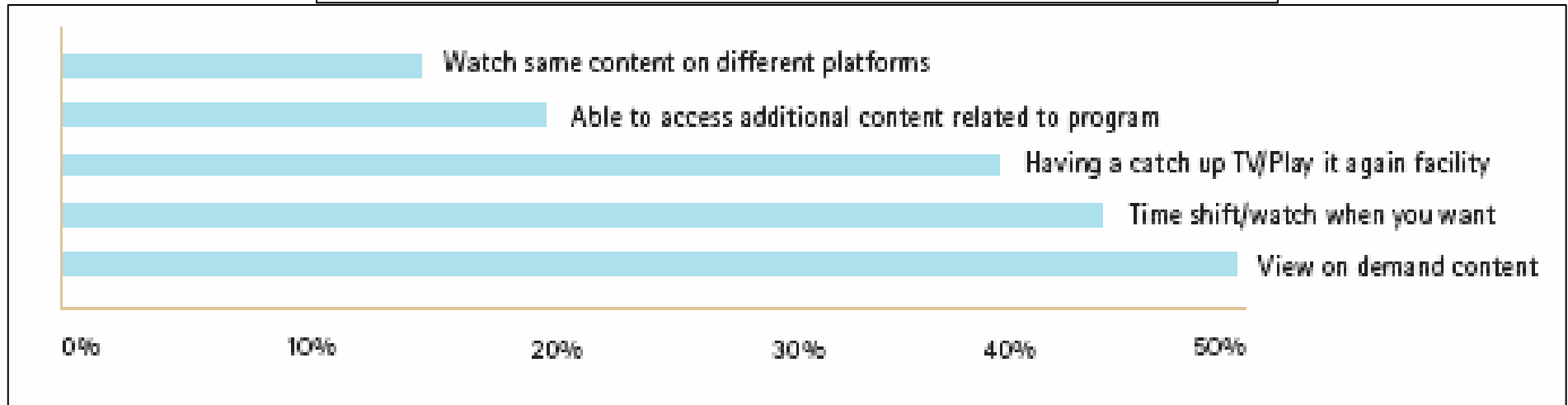
- Changing Patterns In Content Consumption
- The Need For Bandwidth And Affordable Access Device(s)
- Path To The 3 Screens (TV, Mobile And PC)
- Take Away

Consumption Pattern of Content Differs

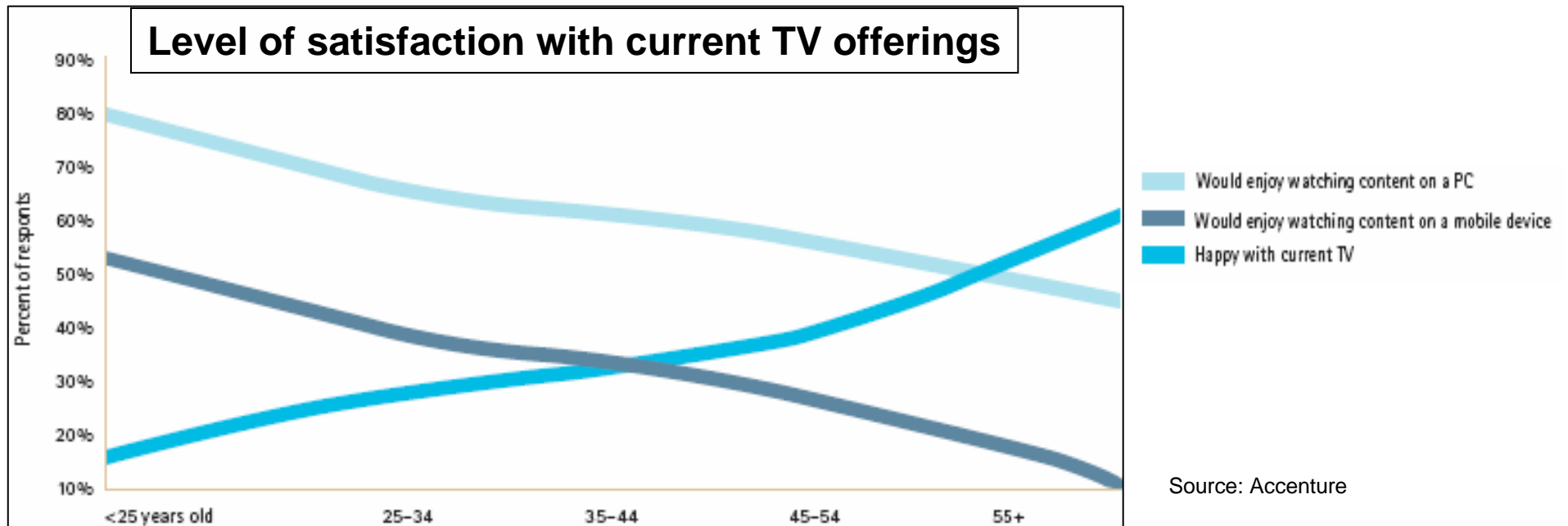
More than 40% want TSTV. 25 to 54 year olds want alternate devices



Compelling features of an "enhanced TV service"



Level of satisfaction with current TV offerings



Source: Accenture

Emergence of i-Factor



“I can control the information flow”



“I can search for what I want”



“I can read what I want”



“I can create the content”



Service Providers will need to adhere to current trends in media consumption to best monetize their investments

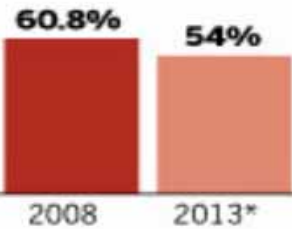
Consumption of Network Based Video Intensive Applications On The Rise



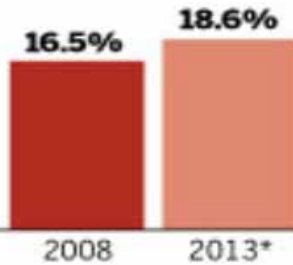
Global video games

Software sales, by type (% share of total)

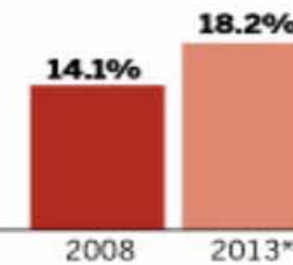
Consoles



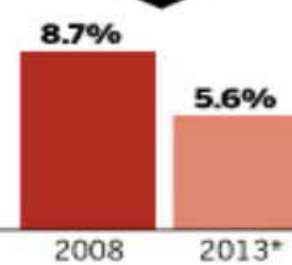
Online



Wireless



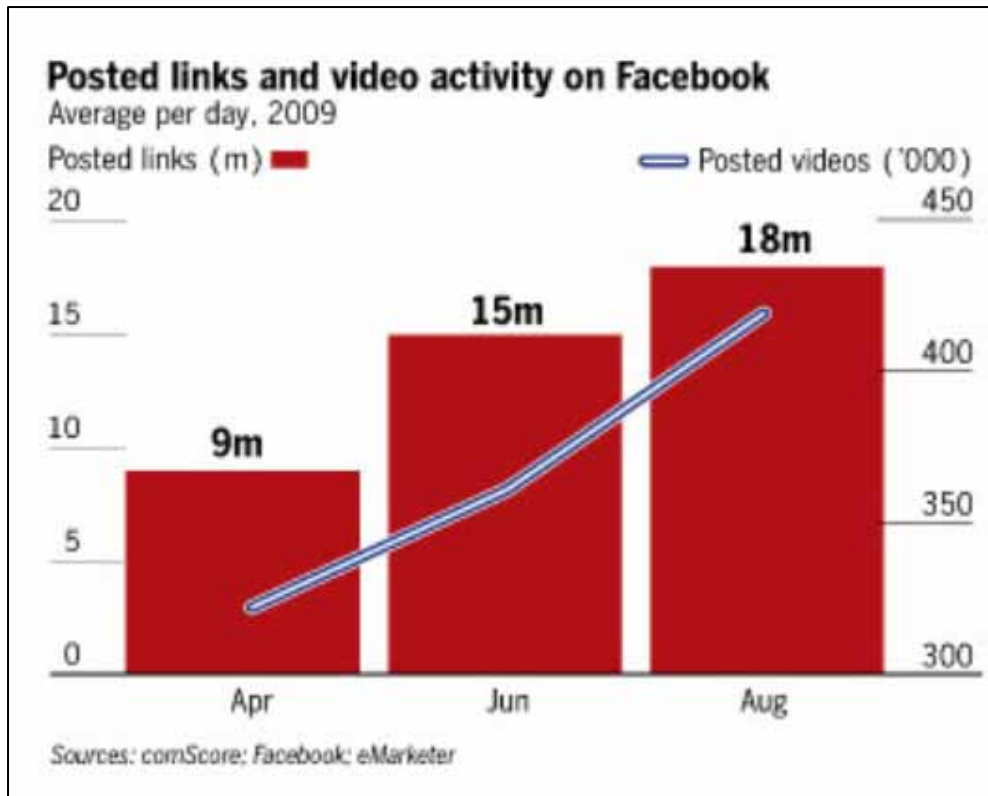
PC games



Source: PwC * Forecasts

Photo: Lynn Sammonds Photography.co.uk

Social Networking Sites Are Adding to the Demands for Video Content



US Streaming Video Market Overview

Total US Internet Audience October 08	
Total Streamers & Downloaders (000)	13,536,595 45% yoy growth
Unique Streamers & Downloaders (000)	147,283
Reach (% of Total U.S. Internet Audience)	77%
Average online video viewer (Min)	274
Duration of Average online video (Min)	3.0

The average broadband subscriber spends 4.5 hours / month watching online video, or about 92 clips for 3 minutes each (147M US Internet User)

Source: comScore MediaMetrix



Broadcast Yourself™



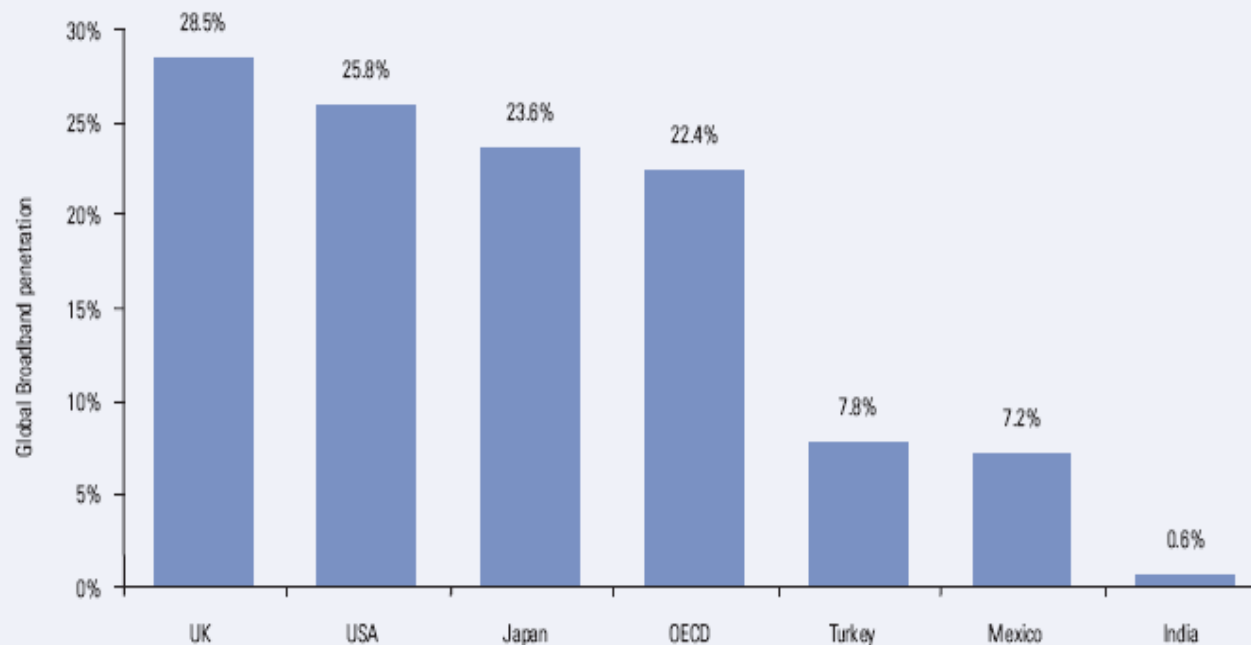
Increased Video Consumption Will Demand Broadband and Affordable Access Device

TV Would Be The Choice Of Access Device Video Communication Will Be Driver For Broadband



- The first gadget in a typical Indian home is not a computer, but instead is a television or a mobile handset
 - 120 Million TV Homes catering to nearly 600 Million viewers/users
 - 600 Million Mobile Subscribers
 - 40 Million PC users

Broadband penetration in India vs. other countries, 2008



Source: OECD, Broadband Statistics, 2008

Reasons For Low Broadband Penetration



- Right Of Way costs
- Poor Wireline Infrastructure
- Low PC Penetration
- Affordability Of Broadband, and
- Lack Of Quality Local Languages Web Content

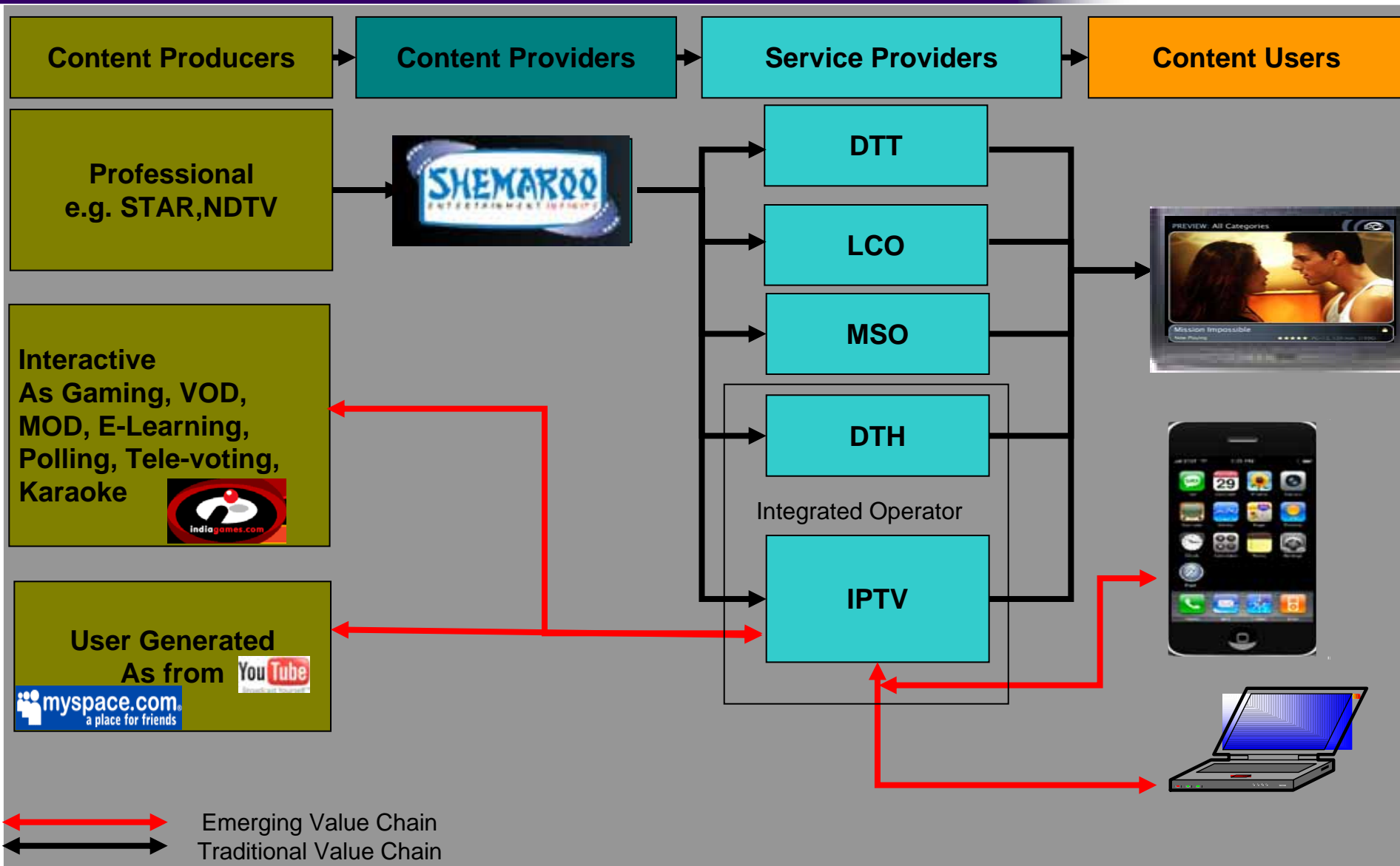
Edutainment - Providing Access to Cost Effective Quality Education



- \$100 PC Vrs \$100 TV
- Demographics
- Access to quality teachers
- Flexible time



IPTV Platform Integrates 'the' 3-Screens Providing a Uniform Video Experience via PC, TV and Mobile



- **Service Providers**
 - Ability to provide bundled services
 - Engage with customers in their choice of access device
 - Will result in higher ARPU, profitability and valuation
- **Content Providers, Content Aggregators, VAS Providers**
 - Will nearly eliminate pilferage of content
 - Greatly increase earning potential by offering content in the form factor as desired by consumer
 - Will create great businesses to the benefit of innovative entrepreneurs
- **Consumers**
 - Better content, affordable prices and improved productivity

Take Away



- Service providers will need to adopt the changing pattern for content consumption as they plan their services
- Growth in video consumption would be the true driver for Broadband in India
- TV as the access device would help reduce the digital divide
- To keep engaging users service providers have to provide superior user experience and complementing view habits across the three screens - PC, TV And Mobile Devices

Thank You



Award for excellence in telecom services and solutions



Three years in a row Award for being the leading vendor for broadband Infrastructure



Award for being the leading provider and most trusted company for IPTV and Broadband

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