

## INDEX

|         |   |    |
|---------|---|----|
| 1       | Introduction.....                                       | 10 |
| 2       | Executive Summary.....                                  | 12 |
| 2.1     | Overview of 3D Consumer Market 2009 ~ 2011 .....        | 14 |
| 2.2     | Contents.....   | 16 |
| 2.3     | Delivery .....  | 17 |
| 2.4     | Platform.....   | 18 |
| 2.5     | Safety of 3D Images on Living Organisms.....            | 19 |
| 3       | Contents.....   | 20 |
| 3.1     | Movie .....   | 20 |
| 3.2     | Contents for Broadcasting/Delivery .....                | 28 |
| 3.2.1   | 2010 FIFA World Cup.....                                | 29 |
| 3.2.2   | USA.....  | 30 |
| 3.2.3   | Japan .....   | 32 |
| 3.2.4   | EU & Others .....                                       | 33 |
| 3.2.5   | 3D Broadcasting Hours.....                              | 35 |
| 3.2.6   | 3D Video Delivery Site.....                             | 36 |
| 3.3     | Blu-ray Disc.....                                       | 37 |
| 3.4     | 3D Game.....  | 37 |
| 3.4.1   | PlayStation3.....                                       | 38 |
| 3.4.2   | NVIDIA 3D VISION .....                                  | 40 |
| 3.5     | Contents for Mobile .....                               | 44 |
| 3.5.1   | Nintendo3DS .....                                       | 44 |
| 3.5.2   | Game for Smart Phone.....                               | 46 |
| 3.6     | Device Requirements for 3D Contents .....               | 47 |
| 3.6.1   | Features of 3D-Ready Devices.....                       | 47 |
| 3.6.2   | 3D-Ready Tabletop .....                                 | 48 |
| 3.6.3   | Device Requirements for 3D Contents .....               | 48 |
| 3.6.4   | Requirements for 3D Contents for Mobile.....            | 51 |
| 4       | Contents Delivery .....                                 | 53 |
| 4.1     | Overview of Contents Delivery .....                     | 53 |
| 4.2     | Inter-Internet Delivery .....                           | 54 |
| 4.3     | Integration of Broadcasting and Internet ( IPTV ) ..... | 56 |
| 4.4     | Leading Global Operators and 3D .....                   | 62 |
| 4.5     | Present and Future State of 3D Format.....              | 63 |
| 4.5.1   | Present State and Issues of 3D Format .....             | 63 |
| 4.5.2   | 3D Display Format.....                                  | 64 |
| 4.5.3   | 3D Delivery Format.....                                 | 67 |
| 4.5.3.1 | ITU-R 3D Format Roadmap .....                           | 67 |
| 4.5.3.2 | Frame Compatible Format (Level 2) .....                 | 70 |

|         |  |     |
|---------|--|-----|
| 4.5.3.3 | Overview of 3D Video codec Trend.....                            | 77  |
| 4.5.3.4 | Service Compatible (ITU-R 2nd generation / Level 3 format) ..... | 80  |
| 4.5.3.5 | Formats Other Than 3D Frame Compatible .....                     | 83  |
| 4.5.3.6 | 2D Compatible 3D format (Service Compatible Format) .....        | 85  |
| 4.5.3.7 | 3DVC (3D video codec) .....                                      | 88  |
| 4.5.3.8 | Broadcasting Format: MUSCADE MVD4.....                           | 93  |
| 4.6     | Contents Delivery Situation in EU .....                          | 97  |
| 4.6.1   | Broadcasting .....   | 97  |
| 4.6.2   | Internet Delivery .....  | 99  |
| 4.6.3   | Mobile Delivery.....   | 100 |
| 4.6.4   | IPTV Delivery.....   | 100 |
| 4.6.5   | Open IPTV Forum .....  | 102 |
| 4.6.6   | HbbTV (2011 may launch), ISO/IEC .....                           | 105 |
| 4.6.7   | Packaged Media.....  | 116 |
| 4.7     | Contents Delivery Situation in USA .....                         | 118 |
| 4.7.1   | Broadcasting .....   | 118 |
| 4.7.2   | Digital Terrestrial TV .....                                     | 118 |
| 4.7.2.1 | Fox Sports .....   | 118 |
| 4.7.3   | Satellite Broadcasting.....                                      | 118 |
| 4.7.3.1 | DirecTV.....   | 118 |
| 4.7.3.2 | Echo Star.....   | 118 |
| 4.7.4   | CATV.....  | 119 |
| 4.7.4.1 | Comcast .....  | 119 |
| 4.7.4.2 | Time Warner Cable.....   | 119 |
| 4.7.5   | Internet Delivery .....  | 120 |
| 4.7.5.1 | Broadband Network .....  | 120 |
| 4.7.6   | Internet Delivery Business in USA .....                          | 123 |
| 4.7.6.1 | YouTube.....   | 123 |
| 4.7.6.2 | Hulu .....   | 124 |
| 4.7.6.3 | Netflix.....   | 126 |
| 4.7.6.4 | Qriocity .....   | 127 |
| 4.7.6.5 | Vudu .....   | 127 |
| 4.7.7   | Mobile Delivery.....   | 128 |
| 4.7.7.1 | FLOTV .....  | 128 |
| 4.7.7.2 | MobiTV .....   | 128 |
| 4.7.8   | IPTV Delivery.....   | 129 |
| 4.7.8.1 | FiOSTV and U-Verse .....   | 129 |
| 4.7.8.2 | AppleTV and GoogleTV .....                                       | 131 |
| 4.7.9   | Packaged Media.....  | 133 |
| 4.8     | Contents Delivery Situation in Japan .....                       | 134 |
| 4.8.1   | Internet Delivery .....  | 134 |
| 4.8.1.1 | Internet Environment in Japan .....                              | 134 |

|         |  |     |
|---------|--|-----|
| 4.8.1.2 | Internet Delivery Service of TV Station..... | 135 |
| 4.8.1.3 | Mobile Delivery .....                        | 136 |
| 4.8.1.4 | IPTV Delivery .....                          | 139 |
| 4.8.1.5 | IPTV Trend in Japan .....                    | 140 |
| 4.8.2   | 3D Broadcasting .....                        | 141 |
| 4.8.3   | Packaged Media .....                         | 143 |
| 4.9     | Contents Delivery in the Chinese Market..... | 145 |
| 4.9.1   | Internet Delivery .....                      | 146 |
| 4.9.2   | Mobile Delivery .....                        | 147 |
| 4.9.3   | IPTV Delivery.....                           | 148 |
| 4.9.4   | 3D Broadcasting .....                        | 149 |
| 5       | 3D Platform.....                             | 150 |
| 5.1     | 3DTV・BD Player/Recorder .....                | 152 |
| 5.2     | 3DTV・Delayer/Recorder Products List.....     | 154 |
| 5.2.1   | DENON .....                                  | 154 |
| 5.2.2   | DX ANTENNA .....                             | 154 |
| 5.2.3   | Mitsubishi Electric Corporation .....        | 155 |
| 5.2.4   | LG Electronics.....                          | 155 |
| 5.2.5   | Pioneer .....                                | 156 |
| 5.2.6   | Panasonic.....                               | 156 |
| 5.2.7   | Samsung .....                                | 157 |
| 5.2.8   | Sharp.....                                   | 158 |
| 5.2.9   | Sony .....                                   | 159 |
| 5.2.10  | Toshiba.....                                 | 162 |
| 5.2.11  | Vizio .....                                  | 163 |
| 5.3     | 3DPC Products List .....                     | 163 |
| 5.3.1   | Acer .....                                   | 164 |
| 5.3.2   | ASUS.....                                    | 164 |
| 5.3.3   | Dell .....                                   | 164 |
| 5.3.4   | Fujitsu.....                                 | 165 |
| 5.3.5   | HP .....                                     | 165 |
| 5.3.6   | Lenovo .....                                 | 165 |
| 5.3.7   | MouseComputer .....                          | 166 |
| 5.3.8   | MSI.....                                     | 166 |
| 5.3.9   | NEC.....                                     | 166 |
| 5.3.10  | ONKYO .....                                  | 167 |
| 5.4     | Personal Device .....                        | 167 |
| 5.5     | Game Console .....                           | 169 |
| 5.5.1   | Nintendo3DS .....                            | 170 |
| 5.6     | Smart Phone .....                            | 170 |
| 5.7     | Digital Still Camera.....                    | 171 |
| 5.7.1   | Fuji Film.....                               | 172 |

|       |  |     |
|-------|--|-----|
| 5.7.2 | Sony .....   | 172 |
| 5.7.3 | MINOX.....   | 173 |
| 5.7.4 | DXG.....   | 173 |
| 5.7.5 | 3D Inlife.....   | 173 |
| 5.8   | Digital Photo Frame.....                                       | 173 |
| 5.8.1 | Fuji Film.....   | 174 |
| 5.8.2 | Exemode .....  | 174 |
| 5.8.3 | New Sight Japan .....  | 174 |
| 5.8.4 | Nikon.....   | 174 |
| 5.9   | Video Camera .....   | 175 |
| 5.9.1 | AIPTEK.....  | 175 |
| 5.9.2 | Exemode .....  | 176 |
| 5.9.3 | JVC .....  | 176 |
| 5.9.4 | Panasonic.....   | 176 |
| 5.9.5 | Sony .....   | 176 |
| 5.10  | Software for PC.....   | 177 |
| 6     | Future of Contents Delivery/Platform .....                     | 179 |
| 6.1   | Key Factors in 3D Penetration Gleaned from Questionnaire ..... | 179 |
| 6.2   | Prospects for the Contents of Autostereoscopic Display.....    | 180 |
| 6.2.1 | Contents of 3D Autostereoscopic Display TV.....                | 180 |
| 6.2.2 | Small 3D Autostereoscopic Display .....                        | 181 |
| 6.3   | Trends and Issues of Buy Once, Play Anywhere .....             | 183 |
| 7     | Safety of 3D Image.....  | 186 |
| 7.1   | Movements Regarding Safety of 3D Image .....                   | 186 |
| 7.2   | Guidelines for Informing Viewers.....                          | 187 |
| 7.3   | Guidelines for Contents Makers .....                           | 188 |
| 7.4   | Guidelines for Manufacturers.....                              | 189 |
| 7.5   | Summary.....   | 189 |
| 8     | Conclusion.....  | 191 |

## Figure

|            |  |    |
|------------|--|----|
| Figure 1-1 | Symbolic Significance of 3D .....                                    | 10 |
| Figure 1-2 | Video Contents Delivery .....  | 11 |
| Figure 2-1 | Key Factors for Consumer 3D .....                                    | 12 |
| Figure 2-2 | Phased Progress of Contents Delivery/Display Format.....             | 14 |
| Figure 2-3 | 3D Industry 2009-2011 .....  | 15 |
| Figure 3-1 | Number of 3D Movie release trend .....                               | 27 |
| Figure 3-2 | Number of 3D Screen Trend (Global) .....                             | 28 |
| Figure 3-3 | Broadcasting System which support terrestrial 2D/3D program in Korea | 35 |
| Figure 3-4 | 3D Broadcasting Hours Forecast .....                                 | 36 |
| Figure 3-5 | Changing of Application.....   | 48 |

|             |  |    |
|-------------|--|----|
| Figure 3-6  | Device Features.....   | 49 |
| Figure 3-7  | TV/PC Optimum viewing distance and view angle .....                                  | 50 |
| Figure 3-8  | 3D Autostereoscopic Displays for Mobile.....   | 52 |
| Figure 4-1  | 3D Contents Delivery.....  | 54 |
| Figure 4-2  | Network Traffic (IBC2010).....   | 55 |
| Figure 4-3  | Average Measured Connection Speed by Country/Region (Akamai<br>2010/Q1 report) ..... | 56 |
| Figure 4-4  | IPTV Categorization and Examples of Service .....                                    | 58 |
| Figure 4-5  | Trend of IPTV Subscribers (Telephony's guide to IPTV march 2008 + FRL)<br>.....      | 58 |
| Figure 4-6  | IPTV Network Elements .....  | 60 |
| Figure 4-7  | Classification of IPTV Services (ITU: FG IPTV-DOC-0135) .....                        | 61 |
| Figure 4-8  | Satellite Service Operator.....  | 62 |
| Figure 4-9  | Classification of Display Technology FDI•2010•01 (By Ichiro Kawakami)<br>.....       | 66 |
| Figure 4-10 | ITU-R 3D Classification .....  | 68 |
| Figure 4-11 | Side-by-Side and Top-and-Bottom.....   | 73 |
| Figure 4-12 | A New Frame Packing Format-1 (SISVEL).....   | 74 |
| Figure 4-13 | A New Frame Packing Format-2 (SISVEL).....   | 75 |
| Figure 4-14 | Major Operators Ready for 3D Rollout.....  | 75 |
| Figure 4-15 | 3D DSV / 3D Camcorder Format.....  | 76 |
| Figure 4-16 | Broadcast 3D Video application as an example of Multiple-view video.                 | 78 |
| Figure 4-17 | Constraints for 3DVC.....  | 79 |
| Figure 4-18 | Coverage of 3D Video Coding.....   | 80 |
| Figure 4-19 | Multiview Video Coding (MVC).....  | 81 |
| Figure 4-20 | Temporal/interview prediction structure for MVC.....                                 | 82 |
| Figure 4-21 | 2D+Delta (TDV).....  | 83 |
| Figure 4-22 | H.264/SVC for 3D.....  | 83 |
| Figure 4-23 | Various 3D Formats.....  | 85 |
| Figure 4-24 | V+D.....   | 86 |
| Figure 4-25 | MVD (ref: Ralf Tanger Fraunhofer HHI) .....  | 88 |
| Figure 4-26 | 3DVC codec.....  | 90 |
| Figure 4-27 | 3DTV System.....   | 90 |
| Figure 4-28 | Signal Format and Display Format.....  | 91 |
| Figure 4-29 | Display/Delivery Format .....  | 92 |
| Figure 4-30 | MUSCADE scalability scheme1 .....  | 94 |
| Figure 4-31 | MUSCADE scalability scheme2 .....  | 95 |
| Figure 4-32 | MVD4.....  | 95 |
| Figure 4-33 | Distribution/Transport Network.....  | 96 |

|             |   |     |
|-------------|---|-----|
| Figure 4-34 | Overview of DVB (ISO/IEC JTC1 SC25 WG1 Pyung-Soo Kim, Ph. D.)   | 97  |
| Figure 4-35 | 3DTV shipping in Europe.....  | 99  |
| Figure 4-36 | Orange service (France).....  | 102 |
| Figure 4-37 | IPTV Solution scope .....   | 103 |
| Figure 4-38 | Open IPTV Forum members .....   | 105 |
| Figure 4-39 | HbbTV supporters .....  | 115 |
| Figure 4-40 | LOVEFiLM .....  | 117 |
| Figure 4-41 | ESPN 3D Website showing 3D program schedule.....  | 120 |
| Figure 4-42 | Residential Fixed High-speed Connections 2005-2008.....   | 121 |
| Figure 4-43 | Hours Online per Internet user (Home Use Only) (Broadband Performance OBI Technical Paper No.4, FCC, August ,2009)..... | 121 |
| Figure 4-44 | Distribution of Hours by Type of Activity .....   | 122 |
| Figure 4-45 | Residential High-speed Connections by Technology as of December 31, 2008.....   | 123 |
| Figure 4-46 | 4K Resolution Video on YouTube.....   | 124 |
| Figure 4-47 | Hulu:Website .....  | 125 |
| Figure 4-48 | Platform of MobiTV (MobiTV's Website) .....   | 129 |
| Figure 4-49 | Number of Subscribers of FiOS TV & U-Verse (Thousand subscribers) .....   | 130 |
| Figure 4-50 | Verizon's Marketing Areas for Fixed-Line Telecom (Cited from Verizon Company Website) .....                             | 131 |
| Figure 4-51 | AT&T's Marketing Areas for Fixed-Line Telecom (including those other than U-verse, Cited from AT&T Website) .....       | 131 |
| Figure 4-52 | Apple TV .....  | 132 |
| Figure 4-53 | Sony Internet TV and Remote Control Equipped GoogleTV .....   | 132 |
| Figure 4-54 | One-Seg Braodcasting Standard.....  | 136 |
| Figure 4-55 | BeeTV (NTT Docomo).....   | 138 |
| Figure 4-56 | Overview of Multimedia Broadcasting (Cited from the website of Multimedia Broadcasting, Inc) .....                      | 139 |
| Figure 4-57 | Specification of IPTV Standard .....  | 141 |
| Figure 4-58 | 3D DVD by Anaglyph.....   | 143 |
| Figure 4-59 | 3D BD by Side by Side .....   | 144 |
| Figure 4-60 | Youku website .....   | 146 |
| Figure 4-61 | aigo: Portable Digital TV (supporting CMMB) .....   | 147 |
| Figure 4-62 | BesTV Website.....  | 148 |
| Figure 5-1  | Overview of 3D Platform.....  | 150 |
| Figure 5-2  | Trend of Commercializing 3D-Related Devices .....   | 151 |
| Figure 5-3  | 3D Displays and Features .....  | 152 |
| Figure 5-4  | 3D Personal Contents Device .....   | 168 |

|            |  |     |
|------------|--|-----|
| Figure 5-5 | 3D Personal Device Forecast.....   | 169 |
| Figure 5-6 | 3D Digital Still Camera .....  | 171 |
| Figure 5-7 | 3D Video Camera .....  | 175 |
| Figure 6-1 | Yahoo! Japan Questionnaire “3DTVs are released one after another from this spring. This year is said to be “First Year of 3D”. Do you think that 3DTV will permeate in homes?” Results. .... | 179 |
| Figure 6-2 | Future Contents Business Image by DECE & KeyChest.....   | 184 |
| Figure 7-1 | Biological Effects of 3D.....  | 190 |
| Figure 8-1 | Three Elements for Consumer 3D.....  | 191 |
| Table 3-1  | 3D Movie Title released in 1950s & 1980/ 2010.....   | 21  |
| Table 3-2  | 3D Movies released 2005-2017.....  | 22  |
| Table 3-3  | Broadcasters which covered 2010 FIFA World Cup in 3D.....  | 30  |
| Table 3-4  | 3D Program Supplier, Carrier and Contents in US .....  | 31  |
| Table 3-5  | Providers which ordinarily provide 3D programs, Path and Contents Information in US.....   | 31  |
| Table 3-6  | Providers which ordinarily provide 3D programs, Channel, Path and Contents Information in Japan .....  | 33  |
| Table 3-7  | Broadcasters which ordinarily provide 3D program, Channel, Country and Contents Information in Europe .....  | 34  |
| Table 3-8  | 3D Game Software for PlayStation3.....   | 38  |
| Table 3-9  | 3D Game Software for NVIDIA® 3D Vision™ .....  | 40  |
| Table 3-10 | 3D Game Software for “Nintendo 3DS”.....   | 45  |
| Table 3-11 | 3D Game Software for Smartphone with 3D Display.....   | 46  |
| Table 4-1  | 3D format based on the generation .....  | 69  |
| Table 4-2  | List of Major Operators/Providers in EU .....  | 98  |
| Table 4-3  | 3D BD Software in US/EU .....  | 117 |
| Table 4-4  | Top U.S. Online Video Content Properties* by Videos Viewed May 2010<br>Total U.S. – Home/Work/University Locations Source: comScore Video Metrix   | 125 |
| Table 4-5  | VOD Services operated by Broadcasters in Japan.....  | 136 |
| Table 4-6  | Video Distribution for Mobile.....   | 137 |
| Table 4-7  | Major IPTV Service in Japan.....   | 140 |
| Table 4-8  | Operators/Channels/Paths/Program Contents doing 3D broadcasts all the time in Japan .....  | 142 |
| Table 4-9  | BD titles containing 3D images sold in Japan (those already released/announced to be released. Data is based on the materials available at the time of announcement).....                    | 144 |
| Table 6-1  | Main comments of respondents regarding the penetration of 3DTV.....  | 179 |

Table 6-2 Common comments of those “who think 3D will penetrate” and “who donot think so” (in decending order of comments)..... 180