

Global IPTV Industry Outlook to 2016 - Favorable Prospects with Rapid Broadband Infrastructure Deployment in Asia

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Abstracts

EXECUTIVE SUMMARY

The report titled “Global IPTV Industry Outlook to 2016 – Favorable Prospects with Rapid Broadband Infrastructure Deployment in Asia” encompasses a comprehensive analysis of the various aspects such as market size of the IPTV market across major regions such as Global, Asia, Europe and North America on the basis of subscribers. The report also incorporates the service revenue generated by the IPTV services across the globe. In addition, the report outlines the market share of major IPTV services players and market size of IPTV industry of several countries such as China, India, Japan, South Korea, Hong Kong, Singapore, France, Germany, Spain, Netherlands, the UK, Belgium, the US and Canada.

Global

The IPTV has gained much momentum in the recent years after the introduction of bundled services in the form of triple play or quadruple play together with the development of the interactive TV platform which has revolutionized the pay TV market. In addition, services such as time shifted TV experience have encouraged TV households to shift from their existing TV platforms to IPTV. Time shifted TV services generally offers the liberty to view favorite shows, movies or series as per the users convenience. On the basis of subscribers, Western Europe has been the largest market for IPTV services till the end 2010, followed by Asia and North America. However, in 2011, the Western European region was outperformed by the strong preference for IPTV services in the Asian markets especially China, South Korea, Japan, India and Singapore. The IPTV penetration among broadband subscribers in the world has

increased from ~% in 2005 to ~% in 2010.

In 2011, Europe contributed around ~% of the global IPTV service revenue, aided primarily by the strong demand for IPTV services in the countries such as France, Germany, Spain and Belgium. The market was closely followed by the IPTV market in North America, with a percentage contribution of around ~% of the total IPTV revenue of USD ~ million in 2011.

Video-on-demand (VoD) is a crucial element of the IPTV service mechanism. Being one of the new entrants to the global pay-TV market, IPTV service providers are searching for a potential differentiator that can aid them to acquire the market of existing pay TV operators or push the IPTV adoption in the form of an efficient pay TV service in markets where the demand for pay TV services has not yet developed till date

Asia

The IPTV market in the Asian region is still on a growing stage therefore showcasing a wider scope for related services. The IPTV market in China is one of the most budding and the largest IPTV market in the world. This growth of the market in China can be attributed to the sustained demand for IPTV services on account of the rising per capita disposable income and the relatively cheaper IPTV installation price as compared to the other countries in the world. China Telecom is the largest IPTV service provider in China with a subscriber base of ~ million or a market share of ~% in 2011.

IPTV in India has a better future given the availability of integrated services such as broadband internet, TV and telephone services under a single package or scheme that too at a reasonable price or a price which is comparatively less than the cost involved in subscribing for internet, broadcast TV and telephone services individually.

The market in Japan scaled up at a CAGR of ~% during the period 2005-2011 on account of the availability of favorable growth dynamics such as higher broadband penetration rate and a significant broadband network.

Korea is the 4th largest IPTV market in the world with a subscriber base of ~ million in 2011. The subscribers during the period 2008-2011 have increased at a CAGR of ~%. . The number of subscribers in Hong Kong increased from ~ thousand in 2005 to ~ thousand in 2011. The subscriber base of the major IPTV operator in Hong Kong, PCCW has increased from ~ million in 2009 to ~ million in 2011. In 2010, the fixed broadband household penetration in Singapore was recorded to be approximately ~%

and is expected to reach around ~% by the year 2016. The IPTV market in Singapore in the future is anticipated to expand to ~ million subscribers in 2016 at a CAGR of ~% from 2012-2016.

Europe

At the end of the year 2009, the European region had recorded ~ million IPTV subscribers. The Western Europe claimed the largest share of multichannel subscribers and revenues, with IPTV contributing around ~% of the pay-TV viewers and approximately ~% of the revenues by the end of the year 2009. In 2011, the IPTV subscriber base in Europe increased by ~% to ~ million as compared to ~ million in 2010.

Of the ~ million subscribers in 2011, around ~% or ~ million subscribers were located in France. Germany contributed approximately ~% of the total IPTV subscribers in Europe in 2011. Other countries such as Belgium, Spain, the UK and Netherlands accounted for ~, ~%, ~% and ~% respectively in the same year. Europe's IPTV market has been significantly contributed by Orange TV, the flagship of France Telecom. Orange TV contributed around ~% of the total IPTV subscriber in France in the year 2011. Telefonica share the Europe IPTV market as the third largest operator with a total subscriber base of ~ thousand in the year 2011.

North America

The IPTV market in North America is the third most predominant market in the world. The market in the region is upheld by the demand for IPTV services in the US. On the basis of service revenue, the US represents the most productive IPTV video service economy, contributing around ~% of the service revenue of North America in 2011.

U-Verse by AT&T is the second largest IPTV service provider in the US with a contribution of around ~% of the total subscriber base in the US in 2011, followed by Surewest and Frontier communication with a contribution of ~% and ~% respectively. . The region is expected to register a CAGR of ~% in the next 5 years and record ~ million subscribers in 2016.

KEY TOPICS COVERED IN THE REPORT

The market size of Global IPTV industry on the basis of subscribers and service

Revenue.

The market size of the IPTV market in the regions such as Asia, Europe and North America on the basis of subscribers.

The market size of the IPTV market of the countries such as China, India, Japan, South Korea, Hong Kong, Singapore, France, Germany, Spain, Netherlands, the UK, Belgium, the US and Canada on the basis of IPTV subscribers.

Market segmentation of Global IPTV Industry by regions such as Asia, Europe and North America on the basis of service revenue.

Trends and Development of the Global IPTV Industry.

Competitive landscape of the major IPTV operators in the regions such as Asia, Europe and North America.

Future outlook and projections of IPTV market of the regions such as Asia, Europe and North America on the basis of subscribers.

Future outlook and projections of IPTV market of the countries such as China, India, Japan, South Korea, Hong Kong, Singapore, France, Germany, Spain, Netherlands, the UK, Belgium, the US and Canada on the basis of IPTV subscribers.

Contents

1. GLOBAL IPTV MARKET INTRODUCTION

2. GLOBAL IPTV MARKET SIZE, 2005-2011

3. GLOBAL IPTV MARKET SEGMENTATION, 2005-2011

3.1. By Subscribers, 2005-2011

3.2. By Service Revenue, 2011

4. GLOBAL IPTV VIDEO ON DEMAND

5. TRENDS AND DEVELOPMENT IN THE GLOBAL IPTV MARKET

Increasing Number of Fixed Line Broadband Subscribers

Preference for Multi Screen Services with the emergence of Smart Phones and Tablets

Convergence of OTT Video Services with IPTV

Migration of Cable Operators to IPTV Service Platform

6. BASIC CHALLENGES AND SOLUTIONS FOR IPTV DEPLOYMENT

Need For an Efficient Network Architecture

Quality of Service and Quality of Experience

The Challenges of Content Security

7. GLOBAL IPTV MARKET FUTURE OUTLOOK AND PROJECTIONS, 2012-2016

7.1. Cause and Effect Relationship between Dependent And Independent Factors
Prevailing In the Global IPTV Industry

8. ASIA IPTV MARKET

8.1. Asia IPTV Market Size by Subscribers, 2005-2011

8.2. China IPTV Market Size and Introduction, 2005-2011

8.2.1. Market Share of Major IPTV Operators in China, 2011

8.2.2. China IPTV Market Future Outlook and Projections, 2012-2016

8.3. India IPTV Market Size and Introduction, 2005-2011

8.3.1. Competitive Landscape of Major Operators in the IPTV Market in India, 2011

8.3.2. Key issues of the IPTV Market in India

Lack of Proper Physical Broadband infrastructure

Inadequate Broadband penetration and Network Incapability

Content availability and the cost associated with its deployment

Cost of related products

8.3.3. India IPTV Market Future Outlook and Projections, 2012-2016

8.4. Japan IPTV Market Size and Introduction, 2005-2011

8.4.1. Japan IPTV Future Outlook and Projections, 2012-2016

8.5. Korea IPTV Market Size and Introduction, 2008-2011

8.5.1. Market Share of Major IPTV Operators in Korea, 2011

8.5.2. Korea IPTV Future Outlook and Projections, 2012-2016

8.6. Hong Kong IPTV Market Size and Introduction, 2005-2011

8.6.1. Market Share of Major IPTV Operators in Hong Kong, 2009-2011

8.6.2. Hong Kong IPTV Future Outlook and Projections, 2012-2016

8.7. Singapore IPTV Market Size and Introduction, 2007-2011

8.7.1. Singapore IPTV Future Outlook and Projections, 2012-2016

8.8. Asia Pacific IPTV Market SWOT Analysis

Strength

Weakness

Opportunities

Threats

8.9. Asia IPTV Market Future Outlook and Future Projections, 2012-2016

8.10. Macro-Economic Factors of Asia IPTV Market: Historical and Future Projections

8.10.1. Asia Fixed Broadband Subscribers, 2005-2016

8.10.2. Asia TV Households, 2006-2016

8.10.3. Annual Disposable Income, 2005-2016

9. EUROPE IPTV MARKET

9.1. Europe IPTV Market Size by Subscribers, 2005-2011

9.2. France IPTV Market Size and Introduction, 2005-2011

9.2.1. Market Share of Major IPTV Operators in France, 2009-2011

9.2.2. France IPTV Market Future Outlook and Projections, 2012-2016

9.3. Germany IPTV Market Size and Introduction, 2005-2011

9.3.1. Market Share of Major IPTV Operators in Germany, 2009-2011

9.3.2. Germany IPTV Market Future Outlook and Projections, 2012-2016

9.4. Spain IPTV Market Size and Introduction, 2005-2011

9.4.1. Market Share of Major IPTV Operators in Spain, 2009-2011

9.4.2. Spain IPTV Market Future Outlook and Projections, 2012-2016

- 9.5. The UK IPTV Market Size and Introduction, 2005-2011
 - 9.5.1. The UK IPTV Market Future Outlook and Projections, 2012-2016
- 9.6. Netherland IPTV Market Size and Introduction, 2005-2011
 - 9.6.1. Netherlands IPTV Market Future Outlook and Projections, 2012-2016
- 9.7. Belgium IPTV Market Size and Introduction, 2006-2011
 - 9.7.1. Belgium IPTV Market Future Outlook and Projections, 2012-2016
- 9.8. Market Share of Major Players in the IPTV Market in Europe, 2007-2011
- 9.9. Europe IPTV Market SWOT Analysis
 - Strength
 - Weakness
 - Opportunities
 - Threats
- 9.10. Europe IPTV Market Future Outlook and Projections, 2012-2016
- 9.11. Macro-Economic Factors of Europe IPTV Market: Historical and Future Projections
 - 9.11.1. Europe Fixed Broadband Subscribers, 2005-2016
 - 9.11.2. Europe Broadband Penetration in Households, 2005-2016
- 9.12. Company Profile of Major Players in the IPTV Market in Europe
 - 9.12.1. France Telekom: Orange TV
 - Company Profile
 - Operating Performance
 - Business Strategies
 - 9.12.2. Belgacom: Belgacom TV
 - Company Profile
 - Operating Performance
 - Business Strategies
 - 9.12.3. Iliad: Free TV
 - Company Profile
 - Operating Performance
 - Business Strategies

10. NORTH AMERICA IPTV MARKET

- 10.1. North America IPTV Market Size by Subscribers, 2005-2011
- 10.2. The US IPTV Market Size and Introduction, 2006-2011
 - 10.2.1. Market Share of Major Players in the US IPTV Market, 2007-2011
 - 10.2.2. The US IPTV Market Future Outlook and Projections, 2012-2016
 - 10.2.3. Company Profile of Major Operators in the US IPTV Market
 - 10.2.3.1. Verizon: Fios Video

Company Overview

Operating Performance

Business Strategies

10.2.3.2. AT&T: U-Verse

Company Overview

Financial and Operating Performance

10.3. Canada IPTV Market Size and Introduction, 2006-2011

10.3.1. Competitive Landscape of The Major Operators of IPTV In Canada, 2011

10.3.2. Canada IPTV Market Future Outlook and Projections, 2012-2016

10.4. North America IPTV Market SWOT Analysis

Strength

Weakness

Opportunities

Threats

10.5. North America Future Outlook and Future Projections, 2012-2016

10.6. Macro-Economic Factors of North America IPTV Market: Historical and Future Projections

10.6.1. The US TV Households, 2005-2016

10.6.2. Annual Disposable Income, 2005-2016

10.6.3. The US Average Annual Expenditure on Entertainment, 2006-2016

11. APPENDIX

11.1. Market Definition

11.2. Abbreviation

11.3. Research Methodology

Data Collection Methods

Approach

11.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: IPTV Content Delivery Network

Figure 2: The Global IPTV Market Size by Subscribers in Thousands and Revenue in USD Million, 2005-2011

Figure 3: Global IPTV Market Segmentation by Asia, Europe, North America and Rest of the World on the Basis of Subscribers in Percentage, 2005-2011

Figure 4: Global IPTV Market Segmentation by Asia, Europe, North America and Rest of the World on the Basis of Revenue in Percentage, 2011

Figure 5: IPTV Video-On-Demand Market Size on the Basis of Revenue in USD Million, 2010-2011

Figure 6: Global Fixed Line Broadband Subscribers in Million and Broadband Penetration per 100 Inhabitants in Percentage, 2005-2016

Figure 7: Global IPTV Market Future Projections on the Basis of Subscribers in Thousands and Service Revenue in USD Million, 2012-2016

Figure 8: Asia IPTV Market Size by Subscribers in Thousands, 2005-2011

Figure 9: China IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 10: Market Share of Major IPTV Operators in China on the Basis of Subscribers in Percentage, 2011

Figure 11: China IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 12: India IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 13: India IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 14: Japan IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 15: Japan IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 16: Korea IPTV Market Size on the Basis of Subscribers in Thousands, 2008-2011

Figure 17: Market Share of Major IPTV Operators in Korea on the Basis of Subscribers in Percentage, 2011

Figure 18: Market Share of Major IPTV Operators in Korea on the Basis of Subscribers in Thousands, 2011

Figure 19: Korea IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 20: Hong Kong IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 21: Hong Kong IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 22: Singapore IPTV Market Size on the Basis of Subscribers in Thousands, 2007-2011

Figure 23: Singapore IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 24: Asia IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 25: Asia Annual Disposable Income by China and India in Millions, 2006-2016

Figure 26: Europe IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 27: France IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 28: France IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 29: Germany IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 30: Germany IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 31: Spain IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 32: Spain IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 33: The UK IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 34: The UK IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 35: Netherland IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 36: Netherlands IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 37: Belgium IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 38: Belgium IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 39: Europe IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 40: Orange TV Subscribers in Thousands, 2009-2011

Figure 41: Belgacom TV Subscribers in Thousands, 2009-2011

Figure 42: Free TV Subscribers in Thousands, 2009-2011

Figure 43: North America IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 44: The US IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 45: The US IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 46: Fios Video Subscribers in Thousands in the US, 2008-2011

Figure 47: U-Verse IPTV Subscribers in Thousands and Service Revenue in USD Million in the US, 2008-2011

Figure 48: Canada IPTV Market Size on the Basis of Subscribers in Thousands, 2005-2011

Figure 49: Canada IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 50: North America IPTV Market Future Projections on the Basis of Subscribers in Thousands, 2012-2016

Figure 51: The US TV Households in Millions, 2005-2016

Figure 52: The US Annual Disposable Income in USD Millions, 2005-2016

Figure 53: The US Average Annual Expenditure on Entertainment in USD, 2006-2016

List Of Tables

LIST OF TABLES

Table 1: Cause and Effect Relationship Analysis between Industry Factors and Expected Industry Prospects of the Global IPTV Industry

Table 2: Market Share of Major IPTV Operators in China on the Basis of Subscribers in Percentage, 2011

Table 3: Competitive Landscape of Major IPTV Operators in India, 2011

Table 4: Market Share of Major IPTV Operators in Hong Kong, on the Basis of Subscribers in Thousands and in Percentage, 2009-2011

Table 5: Asia Fixed Broadband Subscribers in Millions, 2005-2016

Table 6: Asia TV Households in Millions, 2006-2016

Table 7: Market Share of Major IPTV Operators in France on the Basis of Subscribers in Thousands and Percentage, 2009-2011

Table 8: Market Share of Major IPTV Operators in Germany on the Basis of Subscribers in Thousands and Percentage, 2009-2011

Table 9: Market Share of Major IPTV Operators in Spain on the Basis of Subscribers in Thousands and Percentage, 2009-2011

Table 10: Market Share of Major IPTV Operators in Europe on the Basis of Subscribers in Thousands and in Percentage, 2009-2011

Table 11: Europe Fixed Broadband Subscribers in Millions, 2005-2016

Table 12: Europe Broadband Penetration in Households in Percentage, 2005-2016

Table 13: Market Share of Major IPTV Operators in the US IPTV Market on the Basis of Subscribers in Thousands and in Percentage, 2008-2011

Table 14: Competitive Landscape of Major IPTV Operators in Canada, 2011

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