

# Set Top Boxes: Market Shares, Strategies, and Forecasts, Worldwide, 2012 to 2018

<https://marketpublishers.com/r/S84F5672A51EN.html>

Date: May 2012

Pages: 382

Price: US\$ 3,700.00 (Single User License)

ID: S84F5672A51EN

## Abstracts

WinterGreen Research announces that it has published a new study Set Top Boxes: Market Shares, Strategy, and Forecasts, Worldwide, 2012 to 2018. The 2012 study has 382 pages, 109 tables and figures. Worldwide set top box markets are poised to achieve significant growth as the next generation TV Internet systems provide a way to improve bundled channel video services. Set top boxes support entertainment, business, educational, and healthcare video services delivery in the home. Channels and Internet capability will be accessible from the same handset. Gateways will be used to implement multiple device access in the home in some cases. Cloud systems proliferate.

According to Susan Eustis, lead author of the study, 'Set top boxes bring Internet to the home. They are evolving the capability to be used by the cable and TV entertainment industry to deliver Internet services. The cloud represents the preferred Internet delivery model so that services from bundled channels and the Internet can be accessed from one single remote TV selector.'

New types of entertainment and sports oriented services are coming into the home. Bundled channel video is being extended as people achieve Internet access capabilities over the HD TV. Enhancements to the current bundled channels promise significant growth to the cable industry. The ability to enhance channel access with HD TV Internet access promises to have broad appeal. The Internet promises to enhance sports programming with information about the game and players delivered over a devices while a channel is being watched. Information at the same time as a program will be enticing. Others watch programs using a single network available on different devices supporting moving to different parts of the home. New cloud services open more efficient ways to deliver those capabilities to everyone. Set top boxes play a continuing

key role in enabling HD TV bundled channel services delivery.

Set top boxes support bundled video channel services delivery. Bundling continues to have widespread appeal as a way to fund the creation of video entertainment that has broad appeal. Next generation set top boxes and home IP gateway devices offer significant IP based functionality to the home.

Set top boxes are useful particularly in the US where there is widespread adoption of the cable TV services delivery. With the cable video business model spreading worldwide bundled programming is anticipated to continue to have appeal. Markets are poised for significant growth. Video content is proliferating.

The channel offerings bring compelling content that can only be produced under the current business model. They provide a valuable connectivity between the cable services provider content and the home HD TV. While it is nice to think that everyone will pay for a media player or media gateway that offers more functions, in truth, the separate set top box is functional, low cost, and performs a valuable services delivery vehicle.

At the high end, set top box markets are migrating in part to next generation solutions with an integrated multimedia device offering entertainment to the entire home. A cloud model is different. The cloud is very appealing and being implemented by several services providers, assuring continued proliferation of set top boxes for a long time to come.

Bundled channels of video have been a compelling business model replacing broadcast TV free channels with bundles of paid channel packages. This bundled programming model is anticipated to continue to thrive as Internet services are added to the TV set.

Video communication is increasing in importance. Video content is replacing voice, data, text, and print media in many instances. Educational video is evolving a more significant place in the teaching of students. News video is proliferating. Video is being used to accomplish remote healthcare services delivery. These uses of video over the Internet will leverage HD TV devices, complementing the current bundled entertainment programming business model.

Set top boxes will last for a long, long time with the addition of Internet access capability. The issue is whether bringing Internet protocol (IP) to the set top box will destroy the proprietary bundling of channels for TV. The value of bundling is likely to

create persistence of the cable industry business model as it exists now.

Bringing IP to the TV set is not significantly different than having the Intent available on the PC or cell phone. IP TV brings more content, particularly health services as new content, but it is not anticipated to disrupt the existing bundled channel services entertainment and sports model that cable providers bring now.

Set top box dedicated device markets at \$8.7 billion in 2011 are anticipated to reach \$15.6 billion by 2018 as next generation gateways and cloud computing are introduced to manage Internet connectivity to HD TV devices in the home.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, Bloomberg, and Thompson Financial.

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