



World Next Gen TV Market



Next Gen TV Watch Service - 2010

- Database
 - Key Figures for 43 players & 12 countries
 - Operator market shares
 - Innovations by technology, country & player
 - Forecasts up to 2014
- Monthly insights
- In-depth market reports
- Analyst access



World Next Gen TV Market

At a time when the television sector is facing a profound restructuring, as players from formerly disparate sectors, such as telecommunications, cable and equipment manufacturing, converge on the market, IDATE has decided to perform an in-depth analysis of this new environment and notably of the new services being provided on the different media. What will the **Next Generation of TeleVision** look like?

The "Next Gen TV Watch Service" is specifically designed to provide Media Groups, Operators, Government bodies and Regulators with a comprehensive and continuous analysis of the issues affecting the market. Naturally, the rate of progress will not be the same across the board, as each national market will be shaped by the country's intrinsic features and its players.

To provide a simple way to visualise this new and complex structure, for each country and player we include a diagram that illustrates the status of the various services on the different support media.



	Live TV	On demand	Over-the-top video	Interactive services
TV	●	●	●	●
Internet / PC	●	●	●	●
Mobile	●	●	●	●
Connected Devices	●	●	●	●

● Available ● Test ● Project

Next Gen TV Watch Service Calendar – 2010

	January	February	March	April	May	June	July	August	September	October	November	December
Database	Markets, Operators market shares, TV Innovations & Forecasts up to 2014					DB1					DB2	
Insights		I-1	I-2	I-3	I-4	I-5	I-6		I-7	I-8	I-9	I-10
Reports	Social Video		R-1	R-2								
Complementary Reports	IPTV over FTTx		CR-1							CR-2		
Consulting Hours	5 hours - on demand											
Analyst Brief	30 min. Conference Call - on demand											
On-Site Presentation	Optional Report Presentation											

Methodology

- Primary research on 43 Next Gen TV market players
- In-depth analysis of technological issues based on one-on-one interviews with market players
- Penetration and revenue data for 12 countries : France, Germany, Italy, Japan, Netherlands, Poland, Portugal, South Korea, Spain, Sweden, United Kingdom, USA
- Innovations and market share data for 43 players, classified by country
- Market models & Forecasts by type of broadcast

2010 Next Gen TV Watch Service

- **Database + Insights + 2 Reports + Analyst Access: 10,000 EUR excl. VAT – (1 to 5-user license)**
- **Database + Insights + 4 Reports + Analyst Access: 14,000 EUR excl. VAT – (1 to 5-user license)**

For multiple/group licensing options, please contact: Isabel Jimenez – i.jimenez@IDATE.org +33 467 144 404

Database (Excel file)

A unique database devoted to Next Gen TV, including national market data and forecasts, along with a breakdown by technologies – drawing on our continuous tracking of convergence between traditional market players, telecom operators, service providers and equipment manufacturers.

Market data

- 2007-2008-2009 by country and player
- Overview sectors & main players
- Market shares (% of total audience)
- World table

Data & Forecasts up to 2014

- **Pay TV Subscribers**
 - Premium TV
 - Satellite TV
 - Cable TV
 - IPTV
 - Mobile TV
- **TV reception modes**
 - FTA vs. Pay TV
 - Digital
 - Terrestrial, Satellite, Cable, IPTV, Internet only

Equipment

- HDTV
- 3D TV
- Connected TV set
- Laptop / Desktop PC
- Smart Set-top-boxes
- Connected home console
- Handheld console
- Mobile phones with video capacities
- **Revenues**
 - Public funding
 - Advertising revenues
 - Subscription TV revenues
 - PPV / VOD / Catch-up TV revenues (TV set & Internet)
 - Mobile TV & Video revenues

Innovating services by media supports:

TV – Internet – Mobile – Connected Devices

- HD
- 3D
- Catch-up
- VOD
- Live TV Channels
- PPV
- Interactive Services
- Over the top video content
- Widgets
- Social Networks
- Smart Set Top Box
- Specific Video programs developed for PC & mobile
- Other professional content (music, video, games, etc.)
- User generated content
- Interactive Services
- Remote record facility
- Personal storage capacities
- Blogs, forums
- Mobile as a remote control

Players

Broadcast

- ABC
- Antena 3
- ARD-ZDF
- BBC
- Canal+
- DishTV
- DirecTV
- Fox
- France Télévisions
- HBO
- ITV
- M6
- Mediaset
- NBC

- ProSiebenSat1AG
- RAI
- RTL
- RTVE
- Showtime
- Sky Deutschland
- Sky Digital
- Sky Italia

- Sogecable
- Telecinco
- TF1

Cable Operators

- Cablevision
- Charter Communications
- Comcast

- Kabel Deutschland
- Numericable
- ONO
- Time Warner Cable
- Unity Media
- Virgin Media

Telecom Operators

- ATT

- Deutsche Telekom
- Fastweb
- Free
- Orange
- SFR
- Telecom Italia
- Telefonica
- Verizon

Insights

Monthly insights on key Next Gen TV market issues: outstanding event of the month, analysis of the latest market trends, player interviews (broadcast industry, operators, service providers and equipment manufacturers), highlights from major conferences...

Market Reports (pdf, 50-100 pages)

TV groups' diversification strategies

Alternative displays, such as computers, mobile handsets and connected devices are increasing their share of the broadcasting market. At the same time, users are adopting new viewing habits, starting with catch-up TV and over-the-top video being supplied by ISPs. How are broadcasters in the US and Europe expanding their quadruple screen strategies?

Connected TV

The digital home, which is incorporating the latest innovations in devices and networks at an ever increasing pace, is now one of the main focal points for all industry players. This report examines the changing shape of this sector and the outlook for the connected devices market, which will be worth 149 billion EUR in 2013.

Social Video

This report examines the contributions that social networking is making to video/TV services. Social networks are emerging as new channels for distributing and promoting content, while also delivering innovative community-centric solutions to both TV channels and online video services. An analysis of the main trends in social video serves to highlight how social networks have become powerful partners for both traditional and new audiovisual media industry players.

IPTV over FTTx

The relationship between IPTV and FTTx is at the heart of this report which explores operators' key strategies through a detailed examination of their offerings. An analysis of existing technologies, combined with national market conditions, allows us to better understand the motives behind innovative solutions, and the respective issues inherent in the development of IPTV services and FTTx networks.

Analyst Access

- **Consulting Hours** - Direct access to IDATE's Media experts - 5 hours a year
- **Analyst Brief** - 30-minute conference call on a pre-selected Media topic
- **On-Site Presentation*** - Clients may choose a theme from among the 4 market reports supplied. Presentation given by an IDATE Analyst.

*optional - additional fees: preparation + presentation + travel costs

Our clients include

- BBC
- Bouygues
- Canal+
- Cisco
- Deutsche Telekom
- EADS-Astrium
- Ericsson
- European Commission
- Eutelsat
- France Telecom
- France Télévisions
- French Government
- IBM
- Lagardère Active
- M6
- Mediaset
- OFCOM UK
- Orange
- Red.es
- SES-Astra
- SFR
- Swisscom
- TDF
- Telesat
- TF1
- Technicolor



IDATE's Next Gen TV Team

A **dedicated team** of consultants specialised in analysis of the Next Gen TV sector, devoted to meeting the needs of the broadcasting industry, operators, equipment manufacturers, service providers and content providers.



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Florence Le Borgne, Director of Studies, joined IDATE in July 1998. She is now head of TV & Digital Content Business Unit. Florence's prime area of focus is the development of digital technologies (terrestrial, cable, satellite and IPTV, mobile TV, digital cinema, video and TV on the web) dealing with both the economic and strategic aspects of those sectors. More generally, her work involves analysis of media groups' strategies, chiefly in Europe and Japan. Before coming to IDATE, Florence Le Borgne worked as the Head of Research in the Nord-Pas-de-Calais Regional Development Agency's Economic Observation department, where she devoted herself primarily to issues relating to the Information Society, the development of telework and the mastery of key technologies. Florence Le Borgne is a graduate of the Lille school of management EDHEC (Ecole des Hautes Etudes Commerciales).



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About IDATE

Founded in 1977, IDATE is one of Europe's foremost market analysis and consulting firms, whose mission is to provide assistance in strategic decision-making for its clients in the **Telecom, Internet and Media industries**.

Consulting – IDATE has established its credibility and independence in conducting consultancy and study assignments on behalf of its clients:

- **Market studies:** techno-economic monitoring, modelling and forecasts, sector-specific analyses, qualitative/quantitative surveys
- **International Benchmarking:** market positioning, convergence strategies, innovation follow-up
- **Public policies:** public policy definition and assessment, project management, regulatory analyses

Research – IDATE'S clients benefit from the knowledge and expertise of its teams of specialists, and from its ongoing investment in its information and strategic monitoring system – along with access to a singular array of **market reports, data, analyses and support services**.

DigiWorld – IDATE is also instrumental in providing a forum for international debate between the industry's key players through its annual DigiWorld programme, supported by its members representing the sector's most prominent companies:

DigiWorld Network (a series of monthly meetings in European capitals and international business trips), **DigiWorld Events** (the DigiWorld Summit annual conference and a series of associated seminars devoted to the year's central issues), **DigiWorld Publishing** (the DigiWorld Yearbook and the DigiWorld Economic Journal (Communications & Strategies))

Sales Information

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