

Internet Protocol Television (IPTV) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Internet Protocol Television Market size is estimated at USD 44.29 billion in 2024, and is expected to reach USD 105.64 billion by 2029, growing at a CAGR of 18.99% during the forecast period (2024-2029).

Key Highlights

- The market is shifting from traditional broadcasting modes such as cable or satellite TV to internet-based streaming. Internet Protocol Television (IPTV) plays a significant role in this transitional phase. With improved communication technology and advancements in network architecture, these developments have also positively impacted the market.
- Technological advancements have led to increased IPTV subscribers and a growing demand for HD channels and video-on-demand services. The subscription numbers are also rising due to new market expansion. The increasing penetration of Internet-based streaming services is expected to drive the market further.
- Companies offer complex deliverables combined with over-the-top (OTT) services, video calling/conferencing, smart home technologies, and video games. Such lucrative strategies adopted by these companies attract clients, leading to an increase in subscribers and driving IPTV market growth.
- Moreover, government initiatives in developing countries like India that favor digital television fuel the adoption of IPTV. However, competition from local cable TV and satellite TV, due to their lower cost and lack of infrastructure for quality and jitter-free service, is limiting the adoption of IPTV to an extent, especially in developing and underdeveloped countries.

Internet Protocol Television (IPTV) Market Trends

Hardware segment to acquire major market share

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- The growing economies across the world are increasing the disposable income of the population in those countries, which is improving people's lifestyles, especially in developing countries. As a result of these economic changes, internet penetration has drastically improved across the globe.
- These factors have led to increased demand from television service consumers for better user experiences regarding both quality and on-the-go viewing options. Cisco predicted that globally, Internet-video-to-TV traffic would account for 18% of consumer Internet video traffic by 2022, down from 25% in 2017. The rise of live streaming also led to increased Internet usage, making Internet penetration a vital factor in this trend.
- As of the end of July 2022, the Internet penetration rate reached 63%. North Europe has the highest internet penetration rate, with 98% of the population having Internet access. In contrast, the Asia-Pacific region has the highest number of Internet users, followed by North America.
- With the availability of cheap internet data, consumers are demanding high-quality television experiences, driving the growth of the hardware in the internet protocol television market worldwide.

Asia-Pacific Expected to Grow Significantly

- Over-the-top and Internet-protocol-television (IPTV) are gaining traction driven by increasing broadband penetration and changing content consumption behaviors in the region. The effect can be significantly observed in Asian countries like India and China, representing 7% and 2.8% GDP growth rates in FY 2022. Further, rapid urbanization in India and China are the major countries in the region and play a significant role in adopting IPTV in households.
- Rising investment in content has led to the creation of new content offering which is beyond Hollywood. Increasingly, India is becoming one of the content hubs, with a wealth of material being created for consumption locally and worldwide. Also, the growth of smartphone users in the region since 2010 has fuelled the demand for IPTV services in mobile devices. The number of smartphone users in its region is half that of global smartphone users, which has crossed the mark of 6 billion in the year 2022.
- Moreover, Indian government initiatives towards digital transformation, such as digitization of cable TV and Direct-to-Home (DTH) services, are also favoring the adoption of IPTV in the country. The advent of network service providers has changed the IPTV scenario in India, with the company providing free IPTV live subscriptions to its customers. With other companies following suit, the demand for mobile-based IPTV services is expected to increase in the region.

Internet Protocol Television (IPTV) Industry Overview

The Internet protocol television (IPTV) market trend is consolidated but inclining towards fragmentation with the increasing number of players offering the hardware setup and IPTV service systems. Also, the market is undergoing vertical integration as TV manufacturers are partnering with telecom companies providing built-in set-up-box encouraging the adoption of IPTV.

In November 2023, Enghouse Networks announced it delivered its new IPTV service to Ile-a-la-Crosse Communications Society Inc. (ICSI) in Saskatchewan, Canada. The service was created and launched despite wildfires threatening telecommunications infrastructure throughout the region. In August 2023, Enghouse was approached by ICSI, which provides TV services in northwestern Saskatchewan. The signal provider for their cable TV service planned to shut down the service in six weeks for economic reasons, and ICSI needed an alternative solution immediately.

In October 2023, M7 Deutschland is expanding its long-standing partnership with Austrian network operator LIWEST. In addition to the introductory cable TV offer with free TV, pay-TV, and foreign-language channels, M7 now supplies the network operator with

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full IPTV license rights, including advanced functions. LIWEST can thus expand its IPTV platform with additional TV channels in HD resolution, which enable viewers to consume TV programs with interactive TV add-on functions. The advanced features include time-shifted TV via restart and replay.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Deliverables
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Introduction to Market Drivers and Restraints
- 4.3 Market Drivers
 - 4.3.1 Demand for High-Definition Channels and Video On-Demand
 - 4.3.2 Interactive Services Packaged Along with IPTV Services
 - 4.3.3 Favorable Government Initiatives
- 4.4 Market Restraints
 - 4.4.1 Competition from Cable TV and Satellite TV Operators
 - 4.4.2 Lack of Infrastructure in Developing Regions to Offer Delay and Jitter-free Service
- 4.5 Industry Value Chain Analysis
- 4.6 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.6.1 Threat of New Entrants
 - 4.6.2 Bargaining Power of Buyers/Consumers
 - 4.6.3 Bargaining Power of Suppliers
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 By Type
 - 5.1.1 Hardware
 - 5.1.2 Service
- 5.2 Geography
 - 5.2.1 North America
 - 5.2.2 Europe
 - 5.2.3 Asia-Pacific
 - 5.2.4 Latin America
 - 5.2.5 Middle East & Africa

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6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Akamai Technologies, Inc.

6.1.2 AT&T Inc.

6.1.3 Cisco Systems Inc.

6.1.4 Ericsson AB

6.1.5 Huawei Technologies Co., Ltd.

6.1.6 Verizon Communications

6.1.7 ARRIS International Plc

6.1.8 Moftak Solutions

6.1.9 Sterlite Tech

6.1.10 Tripleplay Services Ltd.

7 INVESTMENT ANALYSIS

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

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