

High Density IPTV: IP-Based Video in Hotels and MDUs Worldwide

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Report Summary

IPTV in high density environments, such as MDUs and hotels, is, in many ways, different from traditional residential deployments. This report explores the following:

- § Detailed discussion of the unique MDU and hospitality environments in terms of network architecture, market structure, and leading providers.
- § Discussion of key geographic regions, including North America, Asia/Pacific, and EMEA, chronicles regional distinctions in terms of MDU penetration, infrastructure, and relationship structure.
- § Leading solution vendors and providers across these regions are also highlighted.
- § Subscriber and revenue forecasts (2008–2013) are provided for each of the MDU and hospitality markets and are segmented by geographic area.

Hospitality is a non-residential market with a unique structure and perceptions of IPTV. These variances strongly affect the market structure and have given rise to a highly focused group of providers that cater to this market, all of which is explored in detail within the report.

HIGHLIGHTS

- § With the single-family unit housing market in a slump, providers are showing renewed interest in the MDU.
- § Leading telcos are invested in extending their fiber footprint and a component of this effort is bringing fiber (and IPTV) to MDU communities.
- § IPTV is a new, but largely untapped, revenue opportunity for hospitality broadband providers. The hospitality market is on the cusp of significant IPTV growth, with an anticipated \$20.8 million in 2009.

For more information or to purchase, see the [report online](#) or call 1.480.483.4441.

What's in the Report?

- § Subscriber and revenue forecasts, 2008–2013, for IPTV in the MDU and hospitality markets, segmented by region.
- § Detailed information about MDU penetration by country/region.
- § Profiles of leading competitors, including France Telecom, Guest-Tek, NTT DoCoMo, LodgeNet, and Verizon.
- § Discussion and schematic of deployment architecture.
- § Analysis of telcos, integrators, and niche providers.
- § Examination of hotel IPTV as an early-stage market.

Companies Mentioned in this Report

- § Alcatel-Lucent
- § Aliant TV
- § AT&T
- § BitBand
- § BNS
- § Connexion Technologies
- § Cox
- § Cox Business
- § Cox Hospitality Network
- § DoCoMo interTouch
- § Ericsson
- § France Telecom
- § Guest-Tek
- § Hilton
- § Hyatt
- § iBAHN
- § Industria
- § Korea Telecom
- § LEO NET
- § LodgeNet
- § MagiNet
- § Marriott
- § MTS TV
- § OnCommand
- § Radisson
- § Sasktel Max
- § StayOnline
- § Verizon

Whose Needs Does This Report Address?

- § Vendors with network equipment scaled for MDU deployments.
- § Fiber network solution vendors.
- § Hospitality providers/operators.
- § Telcos.
- § Property owners/hotels.

What Questions Does This Report Answer?

- § How big is the MDU IPTV market?
- § Who is best positioned to benefit from this opportunity?
- § How can providers leverage relationships with property management to enhance opportunities?
- § What are the regional opportunities?
- § What is the global opportunity for IPTV in MDUs?
- § What is the future for service growth and evolution in the hotel market?

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Methodology

This report examines the market for Internet protocol television (IPTV) in high density environments, specifically multi-dwelling units (MDUs), and hotels. The report explores technologies, architectures, and infrastructure, as well as deployment strategies, market strategies, and business models. These aspects are explored in the unique environment of an MDU or hotel, as compared to a single-family environment. The report is global in scope with discussion of regional variances in terms of housing, infrastructure, and regulatory constraints/opportunities.

Data collection and analysis for this report entailed primary and secondary research of companies competing in this market, both equipment vendors and installers/providers. The majority of the primary research conducted for this report resulted from phone briefings and email correspondence with product managers and executives with direct market expertise. Among those interviewed for this report were top network operators (Connexion Technologies, Cox, DoCoMo interTouch, and Guest-Tek), installers (BNS), content providers (Revision3), security solutions (Verimatrix), and equipment vendors (Alcatel-Lucent, BitBand, and Industria). Secondary research included analysis of vendor's product literature, review of company product literature, press releases, company profiles, review of financial filings, whitepapers, as well as examination of underlying market dynamics. Statistical information provided by national statistics organizations, as well as international bodies, was used to develop underlying market potential estimates.

In-Stat's high-density IPTV forecasts include usage/revenue forecasts specific to the MDU and hotel markets. Forecasts provide aggregate and annual deployment numbers. Forecasts are built by leveraging multiple sources including, but are not limited to, supply-side market research and secondary sources. Forecasts are based on underlying market models and extensive industry knowledge.

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Related In-Stat Reports

- #IN0804060MBS *Worldwide Telco TV Services 2008: Explosive Growth Continues*, December 2008
<http://www.instat.com/abstract.asp?id=288&SKU=IN0804060MBS>
- #IN0804055MBS *Worldwide HDTV Households: 36 Million and Growing*, December 2008
<http://www.instat.com/abstract.asp?id=288&SKU=IN0804055MBS>
- #IN0804059MBS *The Worldwide Digital Satellite Pay-TV Market, 2008*, December 2008
<http://www.instat.com/abstract.asp?id=288&SKU=IN0804059MBS>
- #IN0804011MBI *Global Telco TV Video Headend Update*, November 2008
<http://www.instat.com/abstract.asp?id=289&SKU=IN0804011MBI>

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